

Security Configuration Overview

Data security makes data available to users by the following means.

- Policies that define grants available through provisioned roles
- Policies defined in application code

You secure data by provisioning roles that provide the necessary access.

When you provision a job role to a user, the job role limits data access based on the data security policies of the inherited duty roles. When you provision a data role to a user, the data role limits the data access of the inherited job role to a dimension of data.

Data security consists of privileges conditionally granted to a role and used to control access to the data. A privilege is a single, real world action on a single business object. A data security policy is a grant of a set of privileges to a principal on an object or attribute group for a given condition. A grant authorizes a role, the grantee, to actions on a set of database resources. A database resource is an object, object instance, or object instance set. An entitlement is one or more allowable actions applied to a set of database resources.

Security Configuration Tasks

- 01: Creating an Employee/User
- 02: Adding Roles to User and Resetting the Password
- 03: Create the Employee/User with HDL template
- 04: Adding the Roles to User with HDL template
- 05: Create Custom Role with View Privileges and add the role to User
- 06: Verify the User in Manager Users
- 07: Add Business Unit Data Access to User
- 08: Setup Vacation Rule for a User
- 09: Setup Printer in Cloud Application
- 10: Run User and Roles Synchronization Process.
- 11: Setup the Manage Procurement Agent
- 12: Creating a Descriptive Flexfields and testing

1: Creating an Employee/User

Creating an employee from HCM's Hire an Employee page.

1. Navigate to My Workforce/My Client Groups → New Person.

The screenshot shows the Oracle Apps88 home page with a blue header bar. In the top right corner, there are icons for Search, Home, Favorites, and OracleApps88. Below the header is a banner with the text "OracleApps88" and "knowledge sharing". On the left, there's a circular logo with the same text. In the center, there's a message box that says "Share thoughts with your colleagues..." with a small icon. To the right of the message box are four circular icons with numbers: "Employee News" (2), "My Flags" (0), "Journal Batches" (1), and "Reports" (7). Below these are six main category icons: Forecasts, Me, Procurement, My Client Groups (which is highlighted with a blue background), Product Management, and Payroll. Each category has a sub-grid of smaller icons representing specific functions like Hiring, Onboarding, Performance, Profiles, etc. At the bottom right of the page is the "Oracle Apps88" logo.

2. Click the Tasks panel tab > Hire an Employee.

The screenshot shows the Oracle Apps88 Tasks panel. At the top, there's a navigation bar with "Search for people", a magnifying glass icon, and OracleApps88. Below the navigation is a section titled "Overview" with a sub-section "New Workers to Process". A red dashed arrow points to a dropdown menu icon in the top right corner of the table area. The table has columns for "Person", "Person Number", and "Include for Automatic Conversion". The dropdown menu contains the following options:

- Hire an Employee
- Add a Contingent Worker
- Add a Nonworker
- Add a Pending Worker

3. Enter the following required fields:

| Field | Value |
|----------------|------------------|
| Hire Date | Today (defaults) |
| Hire Action | Hire |
| Legal Employer | US1 Legal Entity |
| Last Name | Chinthapatla |

First Name Raju

4. Click Next.

Note: If you get a Matching Person Records window, click Continue.

5. Enter Address details: 100 Main Street, Genoa, TX 77034, and Harris County.

Hint: Type in the street address and then the postal code to have the system complete the rest of the address.

6. Under E-Mail Details, click Add Row.

7. Enter:

| Field | Value |
|-----------|------------------------|
| Type Work | E-Mail |
| E-Mail | OracleApps88@Yahoo.com |

8. Click Next.

Hire an Employee: Person Information

Identification Person Information Employment Information Compensation and Other Information Review

Name: Raju Chinthapatla **Worker Type:** Employee
Action: Hire **Legal Employer:** US1 Legal Entity
Action Reason: Hire to fill vacant position **Person Number:** 4334
Hire Date: 1/1/19 **Social Security Number:** 059-57-4321

Home Address

* Country: United States

* Address Line 1: #OracleApps88@Yahoo.co

Address Line 2: #Hyderabad

Address Line 3:

* ZIP Code: 77034

* State: TX

* City: Houston

Tax District:

* County: Harris

Phone Details

| | Primary | * Type | Country Code | Area Code | * Number |
|--|-------------------------------------|------------|--------------|-----------|-------------|
| | <input checked="" type="checkbox"/> | Work Phone | India 91 | | 90959574321 |

Email Details

| | Primary | * Type | * Email |
|--|-------------------------------------|------------|------------------------|
| | <input checked="" type="checkbox"/> | Work Email | OracleApps88@Yahoo.com |

Legislative Information

Citizenship and Visa Information

Contacts

Contact Type:

9. Scroll down to the Assignment tab, select or enter:

| Field | Value |
|---------------|-------------------|
| Business Unit | US1 Business Unit |
| Department | Finance US |
| Location | Chicago |

10. Accept all other defaults.

11. Click Next.

Hire an Employee: Employment Information

Identification Person Information Employment Information Compensation and Other Information Review

Name: Raju Chinthapata
Action: Hire
Action Reason: Hire to fill vacant position
Hire Date: 1/1/19

Worker Type: Employee
Legal Employer: US1 Legal Entity
Person Number: 4334
Social Security Number: 059-57-4321

Enterprise
Hire Date: 1/1/19

Work Relationship Details

Service Dates

Legal Employer
Hire Date: 1/1/19

Payroll Relationship Details

Assignment

| | |
|--------------------------|---------------------------|
| Assignment Number | * Assignment Status |
| * Business Unit | Active - Payroll Eligible |
| Person Type | Employee |
| Projected End Date m/d/y | |

Job

| | |
|---|--------------------------------------|
| Position | FTE 1 |
| Job | Headcount 1 |
| Assignment Name | Start Time 08:30 AM |
| Grade Ladder | End Time 05:30 PM |
| Grade | Basis for Seniority Calculation Days |
| <input checked="" type="checkbox"/> Include in grade step progression | Work Measure Details |
| Department | ACA Eligibility |
| Reporting Establishment | ACA Full Time |
| Location | Limited Nonassessment Period |
| Measurement Period Start Date m/d/yy | |

Manager Details

| | | |
|--------|--------------|---------------------------|
| * Name | EMP001001 | Active - Payroll Eligible |
| * Type | Line Manager | OracleApps88 |

12. Scroll down and expand Expenses Information. (This is needed for Expense Reporting.)

13. Enter or select:

| Field | Value |
|-------------------------------|--------------------------|
| Default Expense Account | 101.10.60501.121.000.000 |
| Expense Check Send-to Address | Home |

14. Click Next.

Hire an Employee: Compensation and Other Information

Name: Raju Chinthapala
Action: Hire
Action Reason: Hire to fill vacant position
Hire Date: 1/1/19

Worker Type: Employee
Legal Employer: US1 Legal Entity
Person Number: 4334
Social Security Number: 059-57-4321

Assignment

- ▶ Salary Information
- ▶ Other Compensation
- ▶ Expenses Information

Default Expense Account: 101.10.60501.121.000.000

Expense Check Send-to Address: Office

Back Next Save ▾ Submit Cancel

15. Scroll down to the bottom of the page to verify that the Employee role is automatically assigned.
16. Click Submit.

Hire an Employee: Review

Identification **Person Information** **Employment Information** **Compensation and Other Information** **Review**

Printable Page **Back** **Next** **Save** **Submit** **Cancel**

Hide Person Information

| | | | |
|---------------|------------------------------|------------------------|------------------|
| Name | Raju Chinthapatla | Worker Type | Employee |
| Action | Hire | Legal Employer | US1 Legal Entity |
| Action Reason | Hire to fill vacant position | Person Number | 4334 |
| Hire Date | 1/1/19 | Social Security Number | 059-57-4321 |

Basic Information

Personal Details

| | |
|---------------|--------------------------------|
| Person Number | 4334 (Generated automatically) |
| Last Name | Chinthapatla |
| First Name | Raju |
| Title | Mr. |
| Gender | Male |
| Date of Birth | 5/28/88 |

Employee Rewards Points

National Identifiers

| | |
|---------------|-------------------------------------|
| United States | Social Security Number: 059-57-4321 |
|---------------|-------------------------------------|

Person Information

Addresses

| | |
|---------|-------------------------|
| Country | United States |
| Type | Home Address |
| | #OracleApps88@Yahoo.com |
| | #Hyderabad |
| | Houston, TX 77034 |
| | Harris |
| | United States |

Phones

| | | |
|---------------|------------|--------------|
| Primary Phone | Work Phone | 919059574321 |
|---------------|------------|--------------|

Email Details

| | | |
|---------------|------------|------------------------|
| Primary Email | Work Email | OracleApps88@Yahoo.com |
|---------------|------------|------------------------|

Service Dates

| | |
|----------------|------------------|
| Legal Employer | Enterprise |
| Hire Date | 1/1/19 |
| | Hire Date 1/1/19 |

Employment Information

Assignment Information

| | | | |
|-------------------|-------------------|--------------------|---------------------------|
| Assignment Number | E4334 | Assignment Status | Active - Payroll Eligible |
| Business Unit | US1 Business Unit | Projected End Date | |
| Person Type | Employee | | |

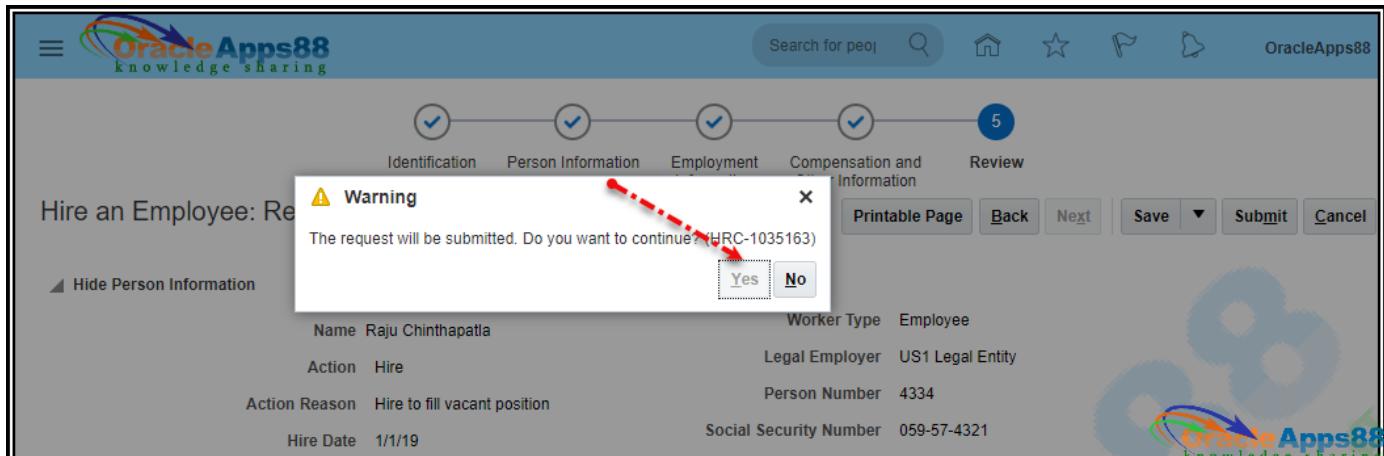
Job

| | |
|-------------------------|--------------------------------------|
| Position | Start Time 08:30 AM |
| Job | System Administrator |
| Grade Ladder | End Time 05:30 PM |
| Grade | Basis for Seniority Calculation Days |
| Department | ACA Eligibility |
| Reporting Establishment | ACA Full Time |
| Location | Limited Nonassessment Period |

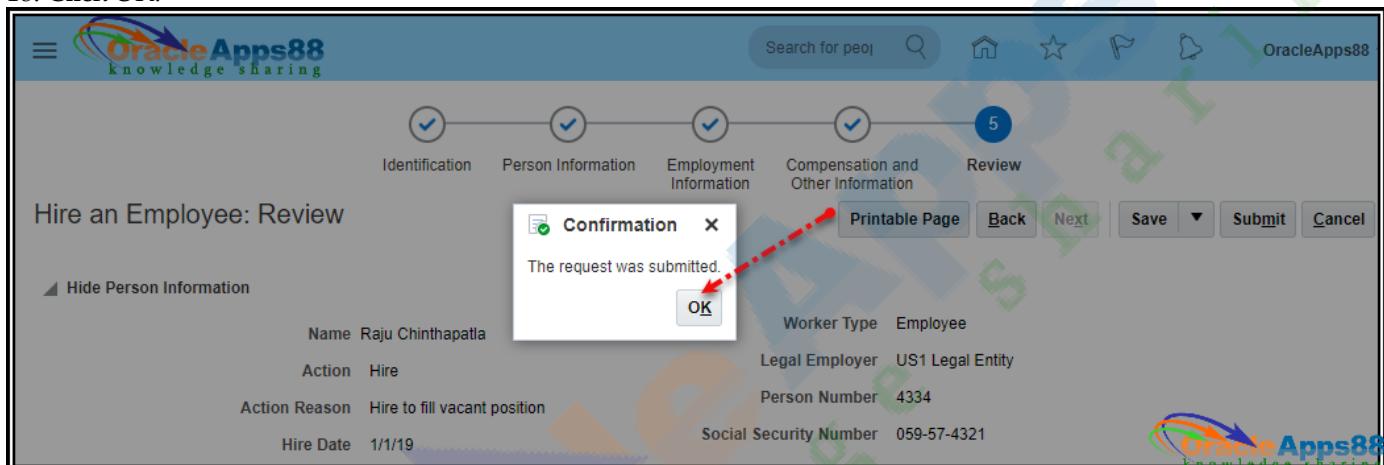
Manager Details

| | | | | | |
|------|--------------|-----------|---------------------------|------|--------------|
| Name | OracleApps88 | EMP001001 | Active - Payroll Eligible | Type | Line Manager |
|------|--------------|-----------|---------------------------|------|--------------|

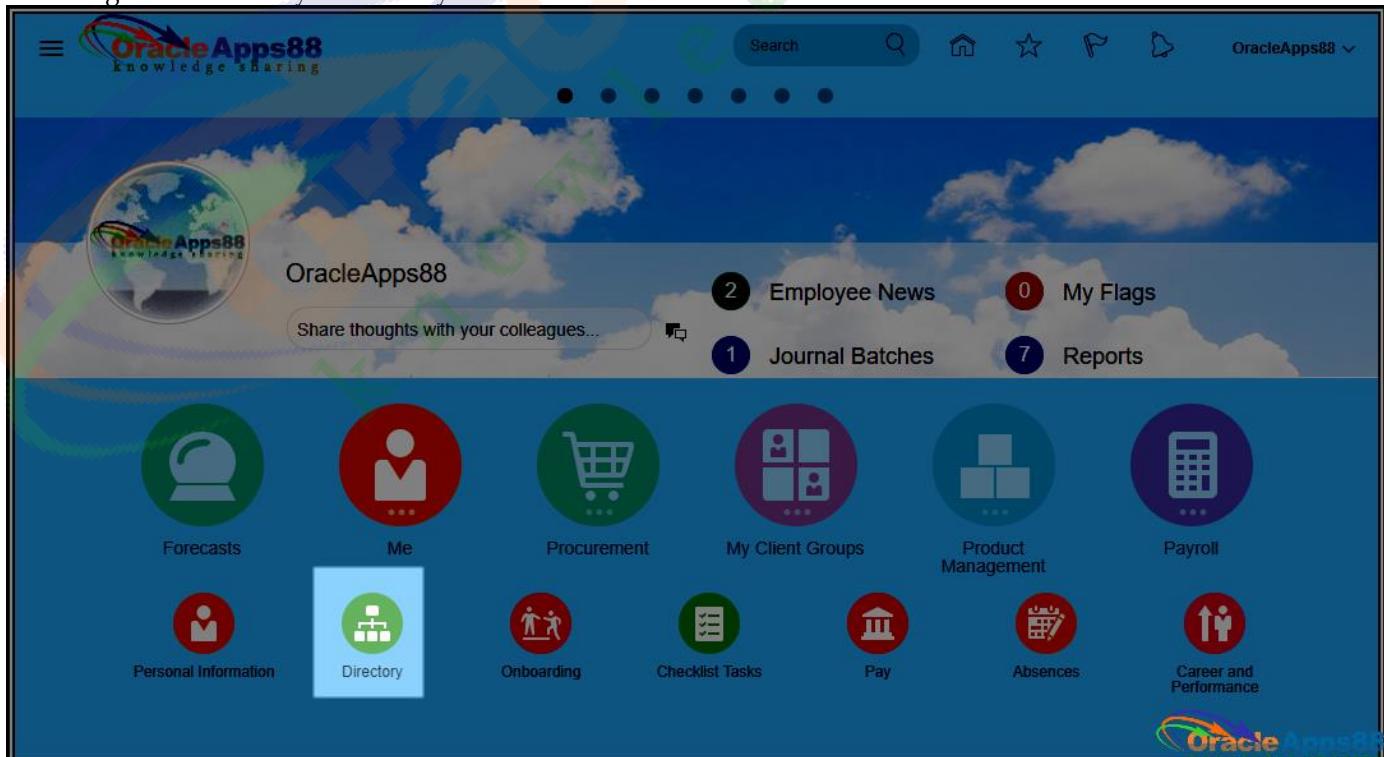
17. Click Yes.



18. Click OK.



19. Navigate to: Directory > Directory.



Note: If you cannot see the entire Navigator, use Control and Scroll Down to minimize the screen.

20. Enter your Raju Chinthapatla Employee.
21. Click the Search icon.

| Name | Business Title | Email | Person Number |
|----------------------|----------------------|------------------------|---------------|
| RC Raju Chinthapatla | System Administrator | OracleApps88@Yahoo.com | 4334 |

22. Click your name to see details.

```
graph TD; Root[OracleApps88 Administrator OracleApps88@Yahoo.com] --> RC[Raju Chinthapatla System Administrator OracleApps88@Yahoo.com 91-9059574321]
```

23. Review the details and go back

The screenshot shows the Oracle Fusion Cloud Service interface for creating a new employee. The employee details are as follows:

- Name:** Raju Chinthapatla
- Title:** System Administrator
- Work Email:** OracleApps88@yahoo.com
- Location:** Chicago
- Work Address:** 233 South Wacker Drive, CHICAGO, IL 60606 Cook, UNITED STATES
- Local Time:** Wed 9:09 AM (CDT)
- Managers and Directs:** Line Manager | Administrator (OracleApps88) with email OracleApps88@yahoo.com

Once Employee/user is created, Application will send a mail notification to user and manager

User Mail Notification

User will get some of the company mandatory task in a mail notification

The screenshot shows a list of tasks assigned to the user:

- FYI: Task E-Signature your Non Disclosure Agreement Allocated for Raju Chinthapatla, 4334 a. [Attachment] 7:55 PM
- FYI: Task Provide Consent to Share Personal Information Allocated for Raju Chinthapatla, 4334 a. [Attachment] 7:54 PM
- FYI: Task Welcome your employee Allocated for Raju Chinthapatla, 4334 a. [Attachment] 7:43 PM
- FYI: Task Send a personalized communication Allocated for Raju Chinthapatla, 4334 a. [Attachment] 7:43 PM
- FYI: Task Order Equipment Allocated for Raju Chinthapatla, 4334 a. [Attachment]

User will get the Reset the password URL in welcome email notification

The screenshot shows an email inbox with one item:

- Subject: Oracle Fusion Applications-Welcome E-Mail
- From: infusion-noreply@oracleleads.com
- To: OracleApps88@yahoo.com
- Date: Aug 26 at 9:32 PM

The email body contains the following text:

Dear Raju Chinthapatla

Congratulations! Your Oracle Fusion Applications account has been successfully created.

Please follow the link below to reset your password.

[https://\[REDACTED\]/hcmUI/faces/ResetPassword?](https://[REDACTED]/hcmUI/faces/ResetPassword?)

For any issues, contact your system administrator.

Thank You,
Oracle Fusion Applications

A red dashed arrow points to the password reset link in the email body.

Reset the password and log into application

The screenshot shows the "SIGN IN ORACLE APPLICATIONS CLOUD" page. The "Reset Password" section contains two input fields: "Password" and "Confirm Password", followed by a "Submit" button.

And also Manager will get employee creation mail notifications

And also manager will get company action required email notifications

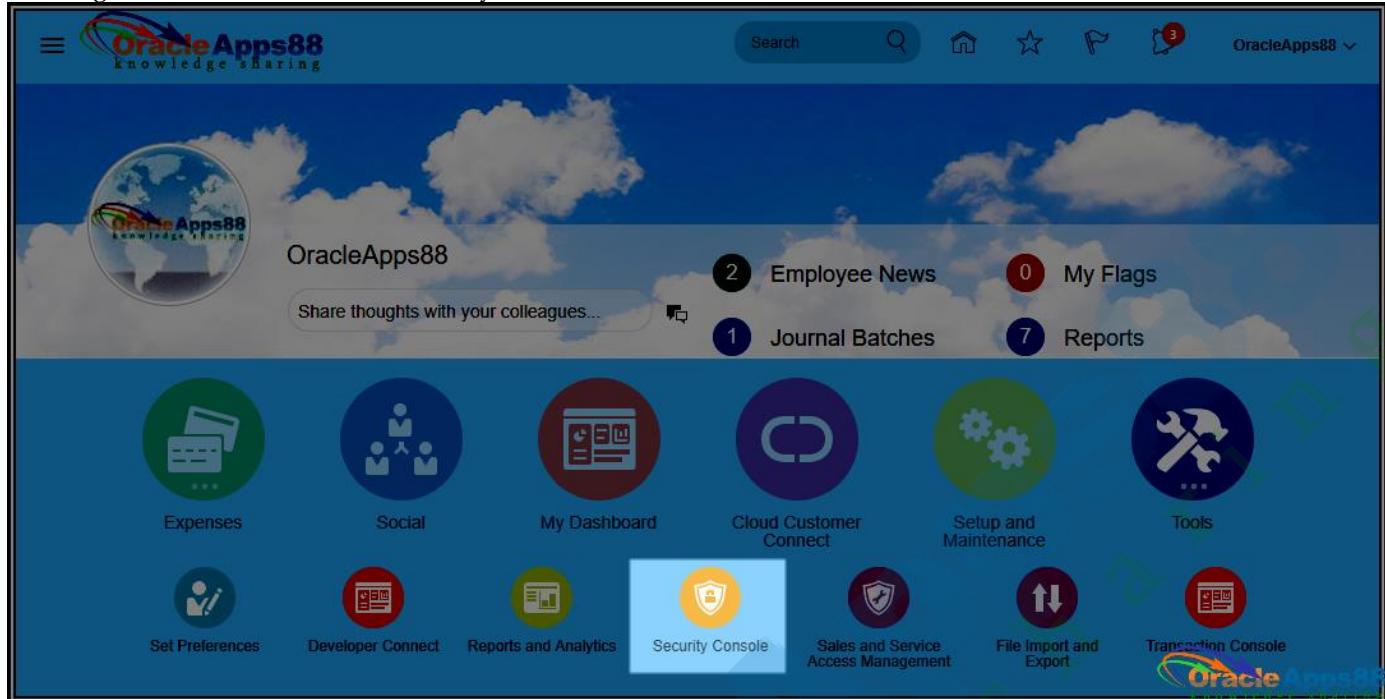
| Today | | | | |
|--------------------------|----------------------------|--|------------------|---------|
| <input type="checkbox"/> | ● OracleApps88 | ★ Action Required: Task Stay Fit !!! Stay Healthy !!! Allocated for Raj... | | 7:32 PM |
| <input type="checkbox"/> | ● OracleApps88 | ★ Action Required: Task Complete Mandatory Learning Allocated for... | | 7:32 PM |
| <input type="checkbox"/> | ● OracleApps88 | ★ Action Required: Task Set Up Your Travel and Expense Profile Alloc... | | 7:32 PM |
| <input type="checkbox"/> | ● OracleApps88 | ★ Action Required: Task Report to the Gym for New Hire Orientation... | | 7:32 PM |
| <input type="checkbox"/> | ● OracleApps88 | ★ Action Required: Task Take The New Hire Survey Allocated for Raj... | | 7:32 PM |
| <input type="checkbox"/> | ● OracleApps88 | ★ Action Required: Task Volunteer! Allocated for Raju Chinthapatla, ... | | 7:32 PM |
| <input type="checkbox"/> | ● HR SPECIALIST (Gloria... | ★ Action Required: Task Enroll for Benefits Allocated for Raju Chinth... | | 7:32 PM |
| <input type="checkbox"/> | ● OracleApps88 | ★ Action Required: Task Collect your Security Badge Allocated for Ra... | | 7:32 PM |
| <input type="checkbox"/> | ● OracleApps88 | ★ Action Required: Task Welcome from the CEO Allocated for Raju C... | | 7:32 PM |
| <input type="checkbox"/> | ● OracleApps88 | ★ Action Required: Task E-Signature your Non Disclosure Agreement... | | 7:32 PM |
| <input type="checkbox"/> | ● OracleApps88 | ★ Action Required: Task Provide Consent to Share Personal Informati... | | 7:32 PM |

2: Adding Roles to Your User and Resetting the Password

Adding Roles to your employee user.

Note : Once we create the employee, user will created automatically with Firstname.Lastname user name

1. Navigate to: More... > Tools > Security Console.



2. Click on the Users tab
3. Enter Employee and select Search.
4. Select your user: Raju Chinthapatla

The screenshot shows the 'User Accounts' page. On the left sidebar, there are icons for Roles (1), Users (2), and Analytics. The main area displays a table of users. A search bar at the top has 'Raju.Chinthapatla' entered (2). A red dashed arrow points from the search bar to the search icon (3). Another red dashed arrow points from the search result 'Raju Chinthapatla' in the table to the user's display name (4). The table columns include User, Status, and Action. The user 'Raju Chinthapatla' is listed with the details: User Name Raju.Chinthapatla, Email OracleApps88@yahoo.com, Status Active, and Action Locked No. The Oracle Apps88 logo is visible at the bottom right.

5. Click Edit to add the roles to user

User Account Details: Raju Chinthapatla

User Information

| | |
|---------------|------------------------|
| User Category | DEFAULT |
| User Name | Raju.Chinthapatla |
| First Name | Raju |
| Last Name | Chinthapatla |
| Email | OracleApps88@yahoo.com |

Account Information

| | |
|--------------------------|--|
| Password Expiration Date | <input checked="" type="checkbox"/> Active <input type="checkbox"/> Locked |
|--------------------------|--|

Associated Worker Information

| | |
|---------------|----------------------|
| Worker Name | Raju Chinthapatla |
| Person Number | 4334 |
| Manager | OracleApps88 |
| Job | System Administrator |
| Business Unit | US1 Business Unit |
| Department | Finance US |

Roles

| Role | Role Code | Assignable | Auto-Provisioned |
|----------|-----------------------|------------|------------------|
| Employee | PER_EMPLOYEE_ABSTRACT | No | Yes |

7. Click Add Role.

Edit User Account: Raju Chinthapatla

User Information

| | |
|---------------|------------------------|
| User Category | DEFAULT |
| * User Name | Raju.Chinthapatla |
| First Name | Raju |
| * Last Name | Chinthapatla |
| Email | OracleApps88@yahoo.com |

Account Information

| | |
|--|-----------------------------|
| Password Expiration Date | <input type="text"/> m/d/yy |
| <input checked="" type="checkbox"/> Active <input type="checkbox"/> Locked | |

Associated Worker Information

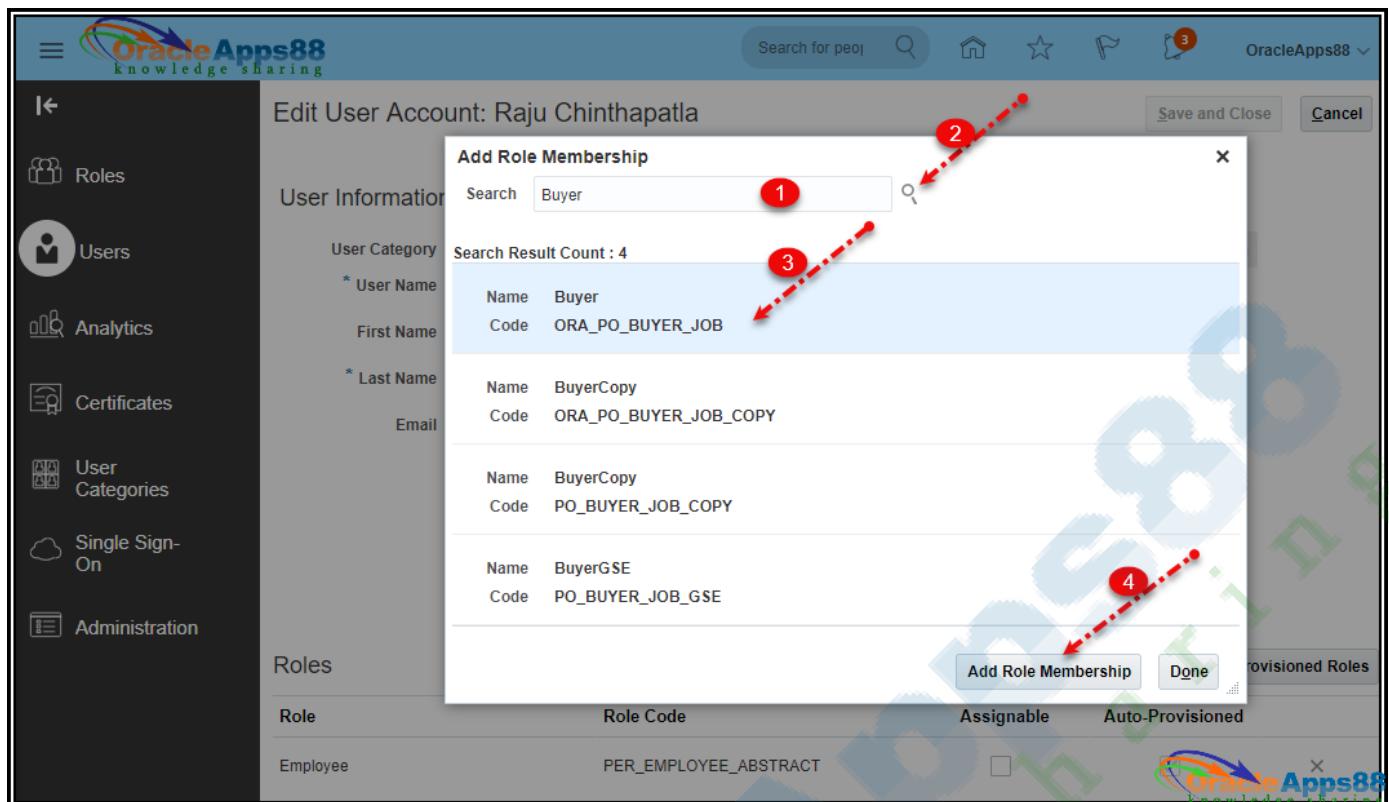
| | |
|---------------|----------------------|
| Worker Name | Raju Chinthapatla |
| Person Number | 4334 |
| Manager | OracleApps88 |
| Job | System Administrator |
| Business Unit | US1 Business Unit |
| Department | Finance US |

Roles

| Role | Role Code | Assignable | Auto-Provisioned |
|----------|-----------------------|--------------------------|-------------------------------------|
| Employee | PER_EMPLOYEE_ABSTRACT | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

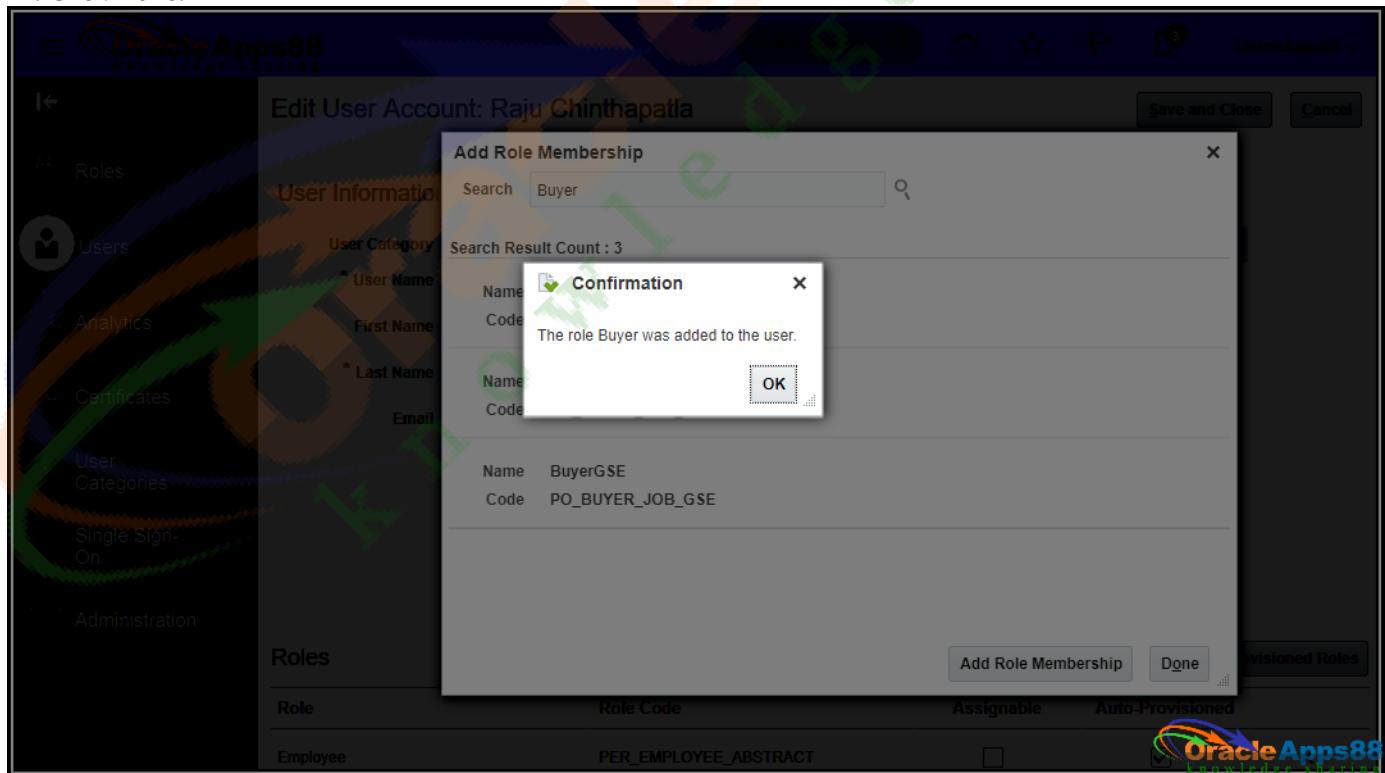
8. Search for the roles

9. Select the Role and Click Add Role Membership.



Add the required roles to user

10. Click OK.
11. Click Done.



12. And roles will effect to user, Save and close

Edit User Account: Raju Chinthapatla

User Information

| | |
|---------------|------------------------|
| User Category | DEFAULT |
| * User Name | Raju.Chinthapatla |
| First Name | Raju |
| * Last Name | Chinthapatla |
| Email | OracleApps88@Yahoo.com |

Account Information

| | |
|--|---------------------------------|
| Password Expiration Date | m/d/yy |
| <input checked="" type="checkbox"/> Active | <input type="checkbox"/> Locked |

Associated Worker Information

| | |
|---------------|----------------------|
| Worker Name | Raju Chinthapatla |
| Person Number | 4334 |
| Manager | OracleApps88 |
| Job | System Administrator |
| Business Unit | US1 Business Unit |
| Department | Finance US |

Roles

| Role | Role Code | Assignable | Auto-Provisioned |
|----------|-----------------------|--------------------------|-------------------------------------|
| Employee | PER_EMPLOYEE_ABSTRACT | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Buyer | ORA_PO_BUYER_JOB | <input type="checkbox"/> | <input type="checkbox"/> |

Buttons: Save and Close, Cancel

13. Click on Reset password to change the password

User Account Details: Raju Chinthapatla

User Information

| | |
|---------------|------------------------|
| User Category | DEFAULT |
| User Name | Raju.Chinthapatla |
| First Name | Raju |
| Last Name | Chinthapatla |
| Email | OracleApps88@Yahoo.com |

Account Information

| | |
|--|---------------------------------|
| Password Expiration Date | |
| <input checked="" type="checkbox"/> Active | <input type="checkbox"/> Locked |

Associated Worker Information

| | |
|---------------|----------------------|
| Worker Name | Raju Chinthapatla |
| Person Number | 4334 |
| Manager | OracleApps88 |
| Job | System Administrator |
| Business Unit | US1 Business Unit |
| Department | Finance US |

Roles

| Role | Role Code | Assignable | Auto-Provisioned |
|----------|-----------------------|------------|------------------|
| Buyer | ORA_PO_BUYER_JOB | No | No |
| Employee | PER_EMPLOYEE_ABSTRACT | No | No |

Buttons: Reset Password, Edit, Done

14. Enter the new password and click on Reset Password button

The screenshot shows the Oracle Apps 88 User Account Details page for 'Raju Chinthapatla'. On the left, a sidebar lists navigation options: Roles, Users (selected), Analytics, Certificates, User Categories, Single Sign-On, and Administration. The main content area displays 'User Information' and 'Account Information'. A 'Reset Password' dialog box is overlaid on the account information. The dialog has two radio button options: 'Automatically generate password' (unchecked) and 'Manually change the password' (checked). Below these are two input fields: '* New Password' and '* Confirm New Password', both containing '*****'. To the right of the password fields is a 'Password Policy' section stating 'Simple: At least 8 characters, 1 number'. At the bottom of the dialog are 'Reset Password' and 'Cancel' buttons. A red arrow points from the text '15. Login the application with new password' to the 'Reset Password' button.

15. Login the application with new password

03: Create the Employee/User with HDL template

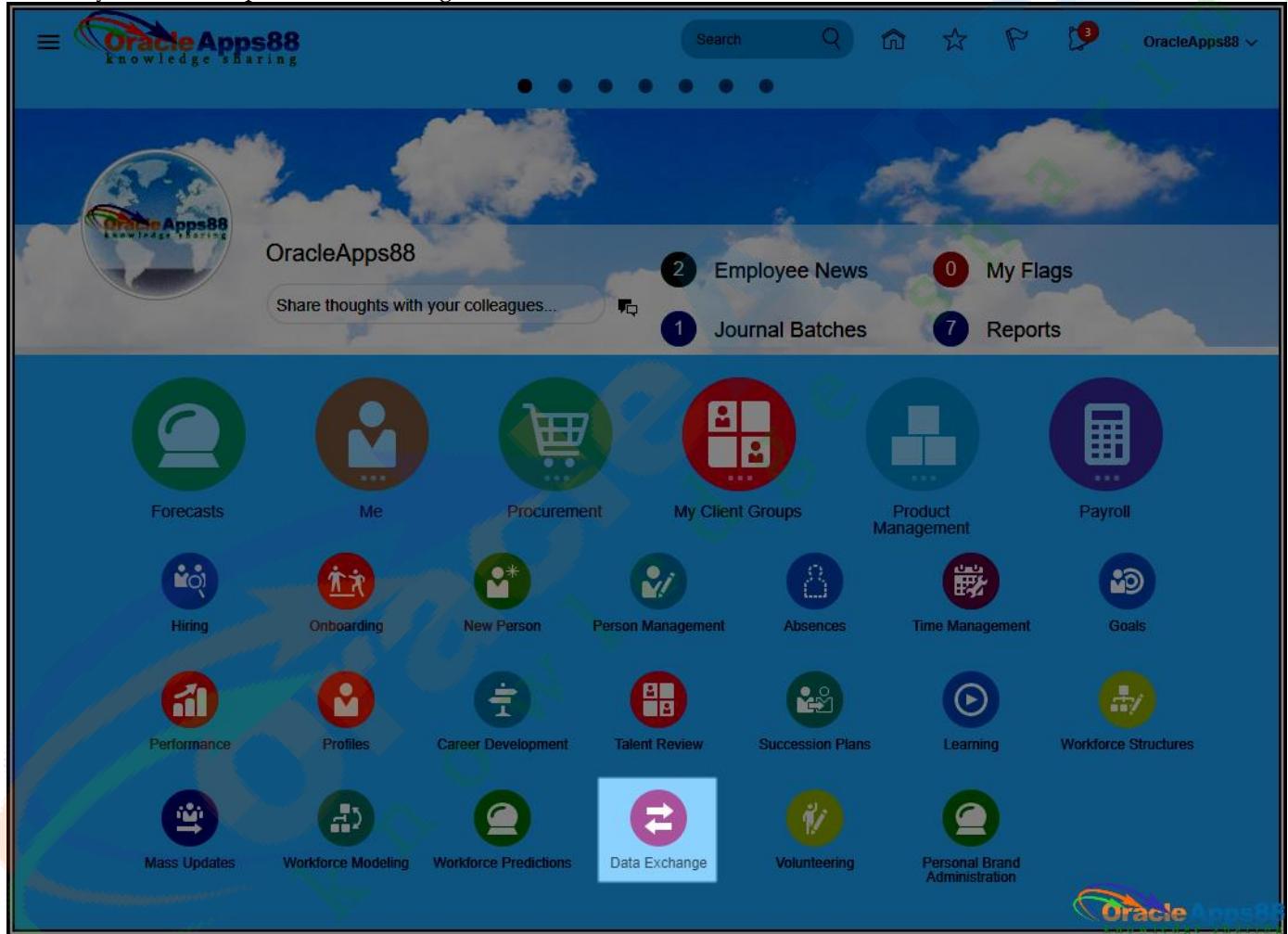
01. Prepare the data file and save with Worker.dat

```

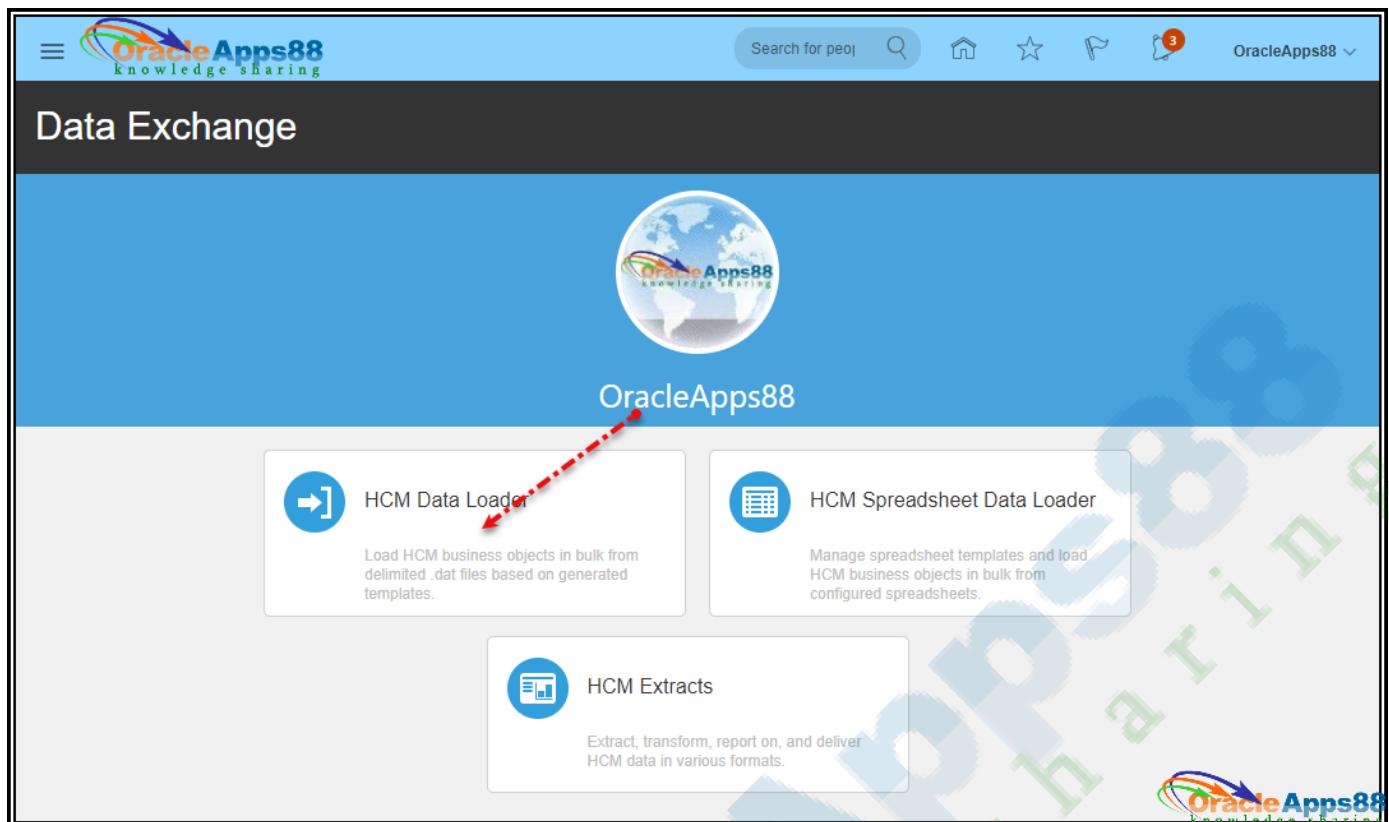
METADATA|Worker|SourceSystemOwner|SourceSystemId|PersonNumber|ActionCode|EffectiveStartDate|EffectiveEndDate|StartDate
MERGE|Worker|HRC_SQLLOADER|02|02|HIRE|2018/01/01|4712/12/31|2018/01/01
METADATA|PersonName|SourceSystemOwner|PersonId|SourceSystemId|PersonNumber|SourceSystemId|NameType|EffectiveEndDate|EffectiveStartDate|FirstName|LastName
MERGE|PersonName|HRC_SQLLOADER|02|02|PER|GLOBAL|4712/12/31|2018/01/01||OracleApps
METADATA|PersonEmail|SourceSystemOwner|PersonId|SourceSystemId|PersonNumber|SourceSystemId|EmailType|DateFrom|EmailAddress
MERGE|PersonEmail|HRC_SQLLOADER|02|02|EMAIL||2018/01/01||OracleApps88@yahoo.com
METADATA|PersonUserInformation|SourceSystemOwner|PersonId|SourceSystemId|SendCredentialsEmailFlag|UsernameMatchingFlag|EmailMatchingFlag
MERGE|PersonUserInformation|HRC_SQLLOADER|02|02|02_UNAME|||||2018/01/01||OracleApps
METADATA|WorkRelationship|SourceSystemOwner|PersonId|SourceSystemId|PersonNumber|SourceSystemId|WorkerType|LegalEmployerName|DateStart
MERGE|WorkRelationship|HRC_SQLLOADER|02|02|02_POS||US1 Legal Entity|2018/01/01
METADATA|WorkTerms|ActionCode|SourceSystemOwner|SourceSystemId|EffectiveStartDate|EffectiveEndDate|EffectiveSequence|EffectiveLatestChange|AssignmentStatusTypeCode
MERGE|WorkTerms|HIRE|HRC_SQLLOADER|02_EMP_TERMS|2018/01/01|4712/12/31|1||ACTIVE_PROCESS||300000034234387012||EMP|02|US1 Legal Entity
METADATA|Assignment|SourceSystemOwner|SourceSystemId|PersonNumber|WorkTermsAssignmentId|SourceSystemId|ActionCode|EffectiveSequence|EffectiveLatestChange|EffectiveEnd Date
MERGE|Assignment|HRC_SQLLOADER|02|02|02_EMP_TERMS|HIRE|1||2018/01/01|4712/12/31|300000034234387012|JOB0056|02|ACTIVE_PROCESS||Finance|101.10.45321.000.000.000|US1 Legal Entity
METADATA|AssignmentSupervisor|SourceSystemOwner|SourceSystemId|AssignmentId|SourceSystemId|EffectiveStartDate|EffectiveEndDate|ManagerAssignmentId|SourceSystemId
MERGE|AssignmentSupervisor|HRC_SQLLOADER|02|02|2018/01/01|4712/12/31||LINE_MANAGER|02|Y|02||01|HIRE
  
```

02. Archive/zip the Worker.dat file in local system

03. Upload the Worker.zip file into HCM Loader
Nav : My Client Groups → Data Exchange



04. Click on the HCM Data Loader link



05. Click on the Actions and Import and Load Data link

HCM Data Loader

Actions ▾ Refresh

Import and Load Data

View Business Objects

Delete Stage Table Data

0%

Stage Table Capacity Used

Recent File Loads

Search by data set name or cont

Created By OracleApps88 Last Updated Last 7 days

Show Filters Sort By Last Update Date - Latest t

No results found.
Check your search criteria.

06. Click on the Import File button

Import and Load Data

My Recent Data Sets

Data Sets

| Data Set | Content ID | Import Status | Load Status | Messages | Import Success(%) | Total Lines | Failed Lines | Load Success(%) | Total Objects | Failed Objects | Last Updated |
|-------------------|------------|---------------|-------------|----------|-------------------|-------------|--------------|-----------------|---------------|----------------|--------------|
| Columns Hidden 12 | | | | | | | | | | | |

Business Objects

| Business Object | Load Order | Import Status | Load Status | Messages | Import Success(%) | Total Lines | Failed Lines | Load Success(%) | Total Objects | Failed Objects | Last Updated |
|------------------|------------|---------------|-------------|----------|-------------------|-------------|--------------|-----------------|---------------|----------------|--------------|
| Columns Hidden 9 | | | | | | | | | | | |

07. Select the Worker.zip file and click on Submit button

Import and Load Data

My Recent Data Sets

Data Sets

| Data Set | Content ID | Import Status | Load Status | Messages | Import Success(%) | Total Lines | Failed Lines | Load Success(%) | Total Objects | Failed Objects | Last Updated |
|-------------------|------------|---------------|-------------|----------|-------------------|-------------|--------------|-----------------|---------------|----------------|--------------|
| Columns Hidden 12 | | | | | | | | | | | |

Business Objects

| Business Object | Load Order | Import Status | Load Status | Messages | Import Success(%) | Total Lines | Failed Lines | Load Success(%) | Total Objects | Failed Objects | Last Updated |
|------------------|------------|---------------|-------------|----------|-------------------|-------------|--------------|-----------------|---------------|----------------|--------------|
| Columns Hidden 9 | | | | | | | | | | | |

Import File

File Source

Local File Oracle WebCenter Content Files

Worker.zip

| File Name | Content ID | Creation Date | Owner |
|---------------------|------------|---------------|-------|
| No data to display. | | | |

08. Click on the Submit button

Import and Load Data

Schedule Request

Process Name: Import and Load HCM Data File

Description: Imports data into the stage tables and optionally loads that data into the application tables.

Schedule: As soon as possible

Parameters

File Name: Worker.zip
Content ID: UCMFA02342113

File Action: Import and load
File Encryption: None

* Maximum Percentage of Import Errors: 100
* Maximum Percentage of Load Errors: 100

Delete Source File:

* Maximum Concurrent Threads for Import: 8
* Maximum Concurrent Threads for Load: 8

Submit Cancel

09. Click on the Refresh link and verify the status

Import and Load Data

My Recent Data Sets

Data Sets

| Data Set | Content ID | Import Status | Load Status | Messages | Import Success(%) | Total Lines | Failed Lines | Load Success(%) | Total Objects | Failed Objects | Last Updated Date |
|------------|---------------|---------------|-------------|----------|-------------------|-------------|--------------|-----------------|---------------|----------------|-------------------|
| Worker.zip | UCMFA02342113 | L | Locked | | 0 | 0 | 0 | 0 | 0 | 0 | 8/28/19 5:58 |

Columns Hidden 12

Business Objects

| Business Object | Load Order | Import Status | Load Status | Messages | Import Success(%) | Total Lines | Failed Lines | Load Success(%) | Total Objects | Failed Objects | Last Updated Date |
|-----------------|------------|---------------|-------------|----------|-------------------|-------------|--------------|-----------------|---------------|----------------|-------------------|
| Worker | 1 | 1 | Locked | | 0 | 0 | 0 | 0 | 0 | 0 | 8/28/19 |

Columns Hidden 9

Import File Done

10. Import status and Load status is changed to Success.

The screenshot shows the Oracle Apps88 interface. At the top, there's a navigation bar with links like 'Import File' and 'Done'. Below it, the 'Import and Load Data' section displays a table of data sets. One row is highlighted with a red border around the 'Import Status' and 'Load Status' columns, both of which contain green checkmarks. The table includes columns for Data Set, Content ID, Import Status, Load Status, Messages, Import Success(%), Total Lines, Failed Lines, Load Success(%), Total Objects, Failed Objects, and Last Updated Date. Below this, the 'Business Objects' section shows a table with a single row for 'Worker', also with green checkmarks in the status columns.

| Data Set | Content ID | Import Status | Load Status | Messages | Import Success(%) | Total Lines | Failed Lines | Load Success(%) | Total Objects | Failed Objects | Last Updated Date |
|------------|---------------|---------------|-------------|----------|-------------------|-------------|--------------|-----------------|---------------|----------------|-------------------|
| Worker.zip | UCMFA02342113 | ✓ | ✓ | | 100 | 8 | 0 | 100 | 1 | 0 | 8/28/19 6:00 |

| Business Object | Load Order | Import Status | Load Status | Messages | Import Success(%) | Total Lines | Failed Lines | Load Success(%) | Total Objects | Failed Objects | Last Updated Date |
|-----------------|------------|---------------|-------------|----------|-------------------|-------------|--------------|-----------------|---------------|----------------|-------------------|
| Worker | 1 | ✓ | ✓ | | 100 | 8 | 0 | 100 | 1 | 0 | 8/28/19 |

11. Submit the "Send Pending LDAP Requests" job to effect in application
Nav : Tools → Schedule Process

The screenshot shows the Oracle Apps88 Navigator. On the left, there's a 'Tools' sidebar with various options: Set Preferences, Announcements, Alerts Composer, Deep Links, Developer Connect, Spaces, Reports and Analytics, Scheduled Processes, Security Console, Sales and Services Access Mana..., and File Import and Export. A red arrow points from the text above to the 'Scheduled Processes' link in the sidebar.

12. Click on Schedule New Process button

Overview

Search Results

Actions ▾ View ▾ Schedule New Process Resubmit Put On Hold Cancel Process Release Process View Log

| Name | Process ID | Status | Scheduled Time | Submission Time |
|------|------------|--------|----------------|-----------------|
| | | | | |

13. Select the “Send Pending LDAP Requests” job and click on ok

Schedule New Process

Type Job Job Set

Name Send Pending LDAP Requests

Description Manages requests to create or update users, roles and role grants in LDAP.

OK Cancel

14. Click on submit

Process Details

This process will be queued up for submission at position 1

Name Send Pending LDAP Requests

Description Manages requests to create or update users, rol...

Schedule As soon as possible

Submission Notes

Notify me when this process ends

Process Options Advanced Cancel

Basic Options

Parameters

User Type All

Batch Size A

Submit

The screenshot shows the Oracle Fusion Applications Process Overview page. At the top, there's a search bar, a home icon, a star icon, a flag icon with a '4' notification, and an OracleApps88 dropdown. Below the header, the title 'Overview' is displayed. A 'Search' section includes a 'Saved Search' dropdown set to 'Last 24 hours'. The main area is titled 'Search Results' and shows a table of processes. The table has columns: Name, Process ID, Status, Scheduled Time, and Submission Time. One row is visible: 'Retrieve Latest LDAP Changes' with Process ID 1610649, Status 'Succeeded', Scheduled Time '8/28/19 2:29 PM UTC', and Submission Time '8/28/19 2:29 PM UTC'. The 'Status' column contains a small green arrow icon pointing right.

| Name | Process ID | Status | Scheduled Time | Submission Time |
|------------------------------|------------|-----------|---------------------|---------------------|
| Retrieve Latest LDAP Changes | 1610649 | Succeeded | 8/28/19 2:29 PM UTC | 8/28/19 2:29 PM UTC |

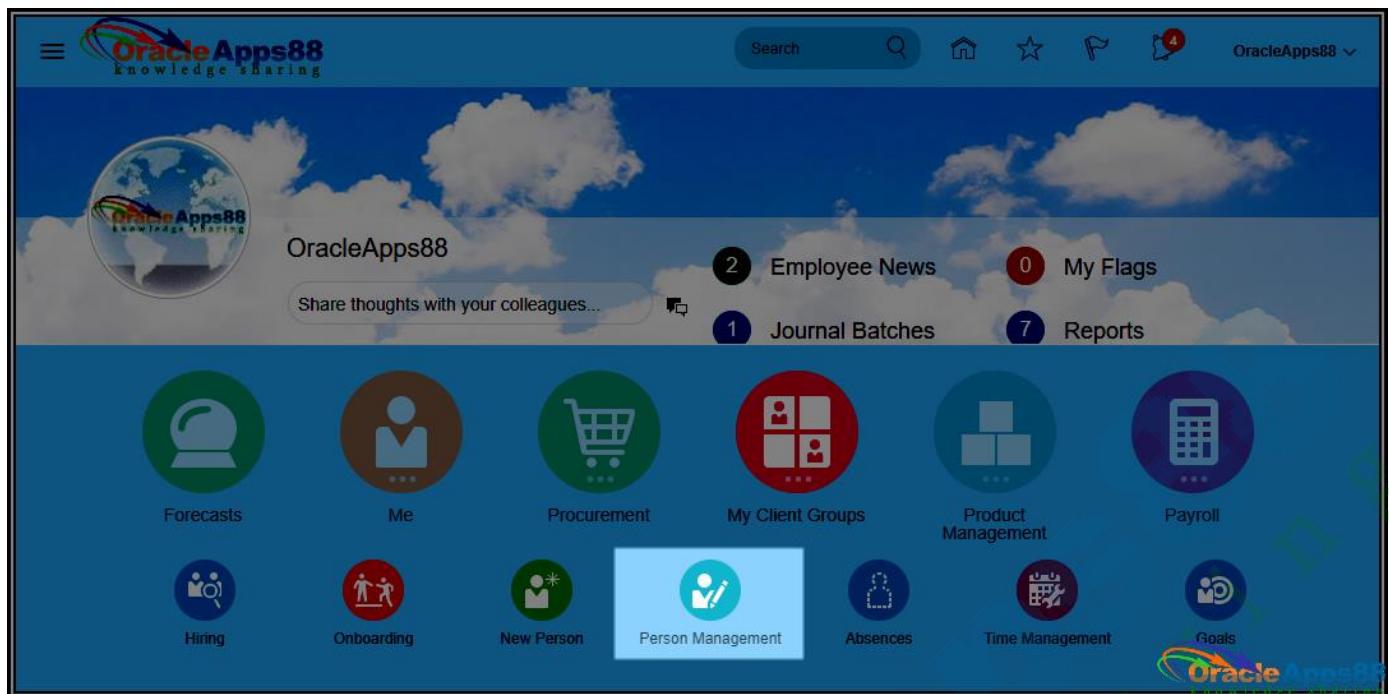
15. Once the Job is Succeeded, User will get the welcome email notification and we can verify the record in application

Click on the url to reset the password

The screenshot shows an email inbox interface. At the top, there are navigation icons: Back, Forward, Restore to Inbox, Move, Delete, Spam, and a more menu. Below that, an email from 'infusion-noreply@oracleleads.com' is listed, with the subject 'Oracle Fusion Applications-Welcome E-Mail'. The email body starts with 'Dear OracleApps', followed by 'Congratulations! Your Oracle Fusion Applications account has been successfully created.' It then instructs the user to follow a link to reset their password: [https://\[REDACTED\]/hcmUI/faces/ResetPassword?](https://[REDACTED]/hcmUI/faces/ResetPassword?). It also says 'For any issues, contact your system administrator.' and ends with 'Thank You, Oracle Fusion Applications'. The Oracle Apps 88 watermark is present across the entire email view.

Verify the record in person management

Navigate to My Workforce/My Client Groups → Person Management.



Search with Person Name and click on search button

| Name | Person Number | National ID | Department | Location | User Person Type | Job | Assignment Status |
|------------|---------------|-------------|------------|----------|------------------|---------------|-------------------|
| OracleApps | EMP001002 | | Finance US | Chicago | Employee | Administrator | Active, Paid |

Review the employee details

OracleApps88 knowledge sharing

Search for peo Home OracleApps88

OracleApps: Person Management

Person Number
EMP001002

Manage Employment x

Manage Employment

Work Relationship

Legal Employer US1 Legal Entity Country United States

Worker Type Employee

Hire Date 1/1/18

Assignment: Administrator

Action Hire Effective Start Date 1/1/18 (1 of 1)

Action Reason Effective End Date

Assignment Details

| | | | |
|-------------------|-------------------|--------------------|---------------------------|
| Assignment Number | EMP001002 | Assignment Status | Active - Payroll Eligible |
| Business Unit | US1 Business Unit | Primary | Yes |
| Person Type | Employee | Projected End Date | |

FTE
Headcount
Start Time
End Time

Basis for Seniority Calculation Days

ACA Eligibility
ACA Full Time
Limited Nonassessment Period

Job Details

Position
Job Administrator

Assignment Name Administrator

Grade Ladder

Grade Include in grade step progression

Department Finance US
Location Chicago

Manager Details

Name OracleApps88 EMP001001 Active - Payroll Eligible Type Line Manager

Expenses Information

Default Expense Account 101.10.60511.000.000.000 Expense Check Send-to Address

Done

Edit View History

Done

Work Measure Details

ACA Eligibility
ACA Full Time
Limited Nonassessment Period

Line Manager

Expense Check Send-to Address

OracleApps88 knowledge sharing

04: Adding the Roles to User with HDL template

01. Prepare the data file and save with User.dat

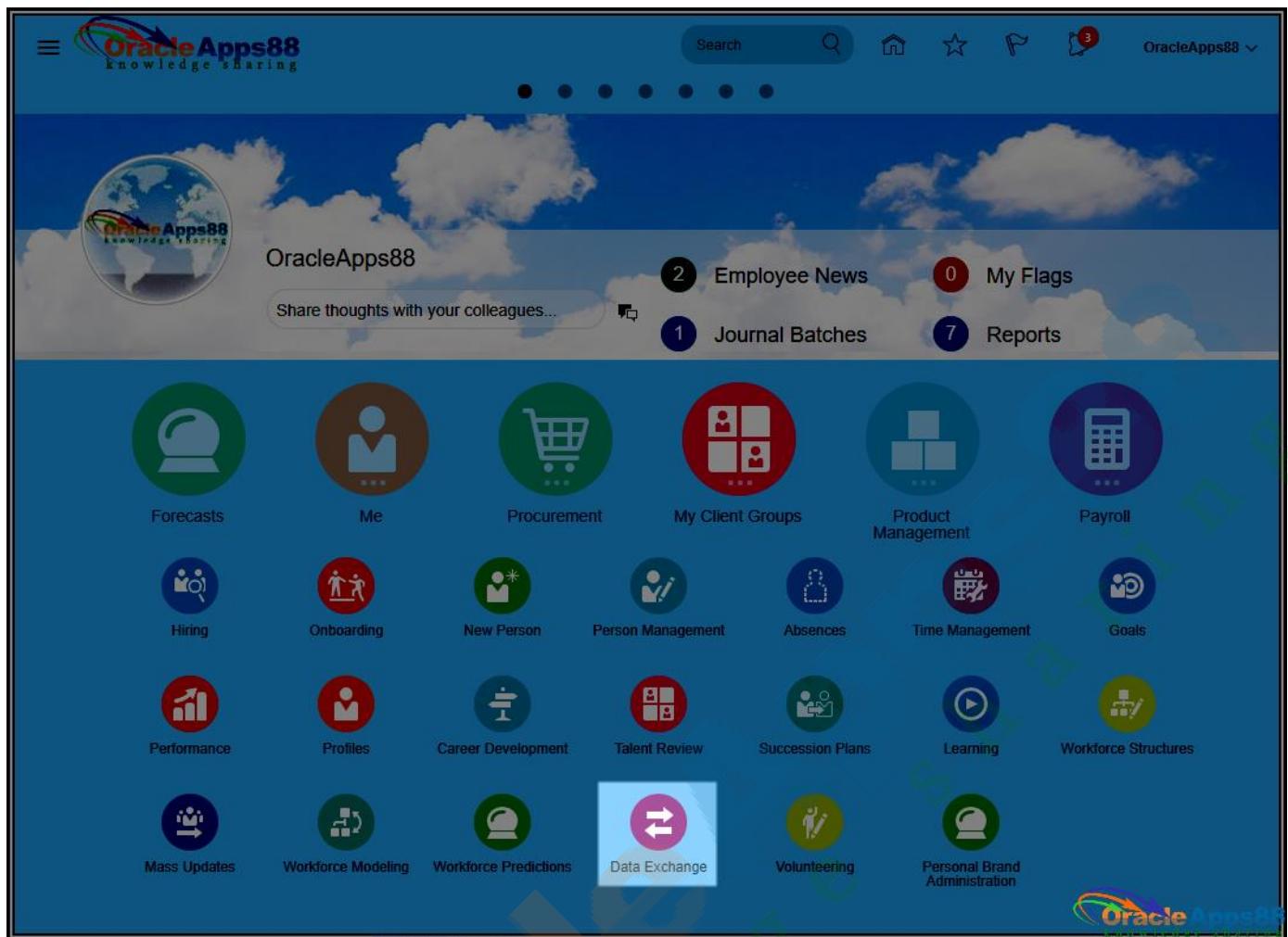
```
METADATA|User|PersonNumber  
└ MERGE|User|02  
    METADATA|UserRole|PersonNumber|RoleCommonName|AddRemoveRole  
    └ MERGE|UserRole|02|ORA_AP_ACCOUNTS_PAYABLE_INVOICE_SUPERVISOR_JOB|ADD  
    └ MERGE|UserRole|02|ORA_AP_ACCOUNTS_PAYABLE_MANAGER_JOB|ADD  
    └ MERGE|UserRole|02|ORA_AP_ACCOUNTS_PAYABLE_PAYMENT_SUPERVISOR_JOB|ADD  
    └ MERGE|UserRole|02|ORA_AP_ACCOUNTS_PAYABLE_SPECIALIST_JOB|ADD  
    └ MERGE|UserRole|02|ORA_AP_ACCOUNTS_PAYABLE_SUPERVISOR_JOB|ADD  
    └ MERGE|UserRole|02|ORA_AR_ACCOUNTS_RECEIVABLE_MANAGER_JOB|ADD  
    └ MERGE|UserRole|02|ORA_AR_ACCOUNTS_RECEIVABLE_SPECIALIST_JOB|ADD  
    └ MERGE|UserRole|02|ORA_CE_CASH_MANAGER_JOB|ADD  
    └ MERGE|UserRole|02|ORA_CST_COST_ACCOUNTANT_JOB|ADD  
    └ MERGE|UserRole|02|ORA_DOO_ORDER_ADMINISTRATOR_JOB|ADD  
    └ MERGE|UserRole|02|ORA_DOO_ORDER_MANAGER_JOB|ADD  
    └ MERGE|UserRole|02|ORA_DOO_ORDER_ORCHESTRATION_ERROR_RECOVERY_MANAGER_ABSTRACT|ADD  
    └ MERGE|UserRole|02|ORA_DOS_SUPPLY_CHAIN_OPERATIONS_MANAGER_JOB|ADD  
    └ MERGE|UserRole|02|ORA_EXM_CORPORATE_CARD_ADMINISTRATOR_JOB|ADD  
    └ MERGE|UserRole|02|ORA_EXM_EXPENSE_AUDIT_MANAGER_JOB|ADD  
    └ MERGE|UserRole|02|ORA_EXM_EXPENSE_AUDITOR_JOB|ADD  
    └ MERGE|UserRole|02|ORA_EXM_EXPENSE_MANAGER_JOB|ADD
```



02. Archive/zip the Worker.dat file in local system

03. Upload the Worker.zip file into HCM Loader

Nav : My Client Groups → Data Exchange



04. Click on the HCM Data Loader link

Data Exchange

OracleApps88

HCM Data Loader

Load HCM business objects in bulk from delimited .dat files based on generated templates.

HCM Spreadsheet Data Loader

Manage spreadsheet templates and load HCM business objects in bulk from configured spreadsheets.

HCM Extracts

Extract, transform, report on, and deliver HCM data in various formats.

05. Click on the Actions and Import and Load Data link

The screenshot shows the Oracle Apps88 HCM Data Loader interface. At the top right, there is a 'Actions' dropdown menu with three options: 'Import and Load Data', 'View Business Objects', and 'Delete Stage Table Data'. A red arrow points to the 'Import and Load Data' option. Below the menu, the main area displays 'Stage Table Capacity Used' at 0% and a section titled 'Recent File Loads' which shows 'No results found.' with a search icon.

06. Click on the Import File button

The screenshot shows the 'Import and Load Data' page. At the top right, there is a 'Import File' button highlighted by a red arrow. Below it, there is a 'Done' button. The main area is divided into two sections: 'Data Sets' and 'Business Objects'. Both sections have tables with columns like Content ID, Import Status, Load Status, Messages, Import Success(%), Total Lines, Failed Lines, Load Success(%), Total Objects, Failed Objects, and Last Updated Date. The 'Data Sets' table has one entry: 'Worker.zip' with Content ID 'UCMFA02342113' and Import Status 'Success'. The 'Business Objects' table has one entry: 'Worker' with Load Order '1' and Import Status 'Success'.

07. Select the User.zip file and click on Submit button

Import and Load Data

Data Sets

| DataSet | Content ID | Import Status |
|------------|---------------|---------------|
| Worker.zip | UCMFA02342113 | |

Business Objects

| Business Object | Load Order | Import Status | Load Status | Messages | Import Success(%) | Total Lines | Failed Lines | Load Success(%) | Total Objects | Failed Objects | Last Updated Date |
|-----------------|------------|--------------------------------------|--------------------------------------|----------|-------------------|-------------|--------------|-----------------|---------------|----------------|-------------------|
| Worker | 1 | ✓ | ✓ | | 100 | 8 | 0 | 100 | 1 | 0 | 8/28/19 6:00 |

08. Click on the Submit button

Import and Load Data

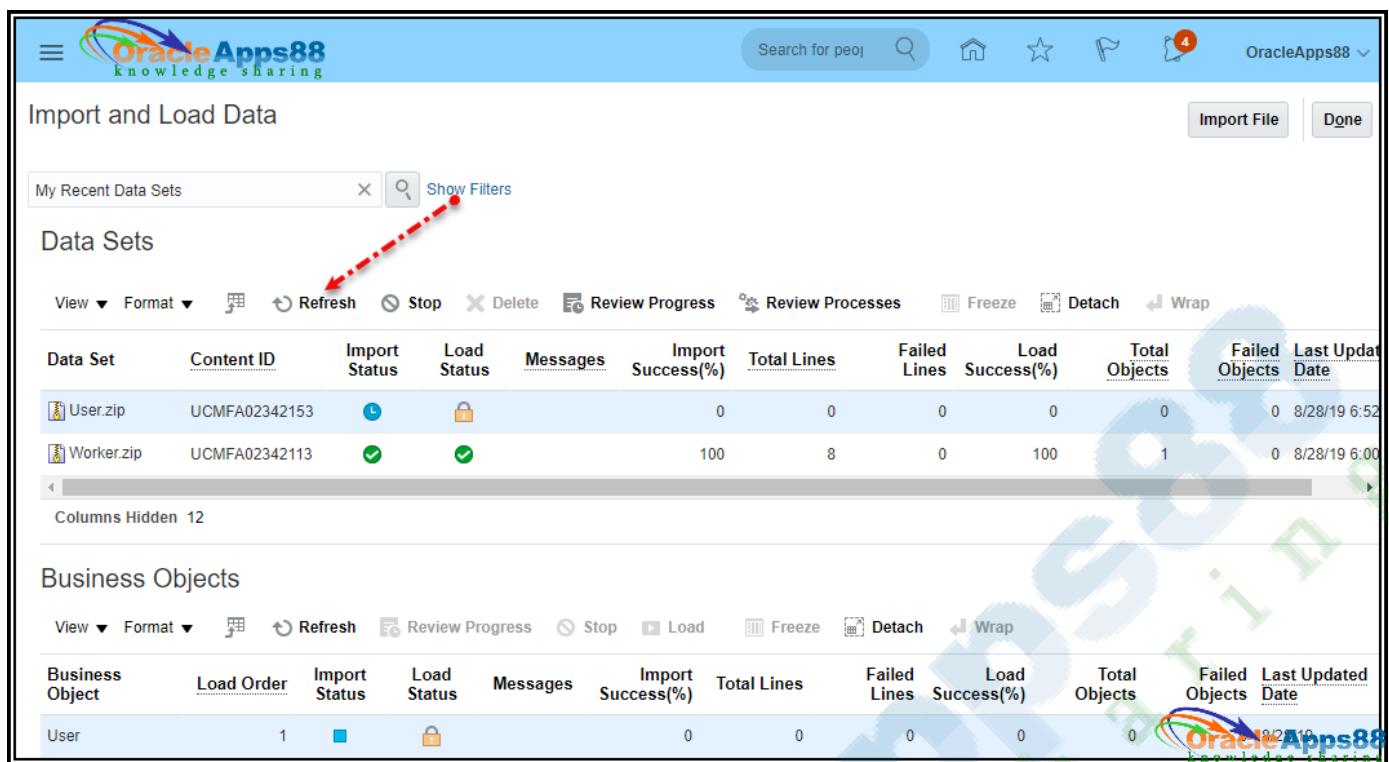
▲ Schedule Request

| | |
|--------------|--|
| Process Name | Import and Load HCM Data File |
| Description | Imports data into the stage tables and optionally loads that data into the application tables. |
| Schedule | As soon as possible |

▲ Parameters

| | |
|---|-------------------------------------|
| File Name | User.zip |
| Content ID | UCMFA02342153 |
| File Action | Import and load |
| File Encryption | None |
| * Maximum Percentage of Import Errors | 100 |
| * Maximum Percentage of Load Errors | 100 |
| Delete Source File | <input checked="" type="checkbox"/> |
| * Maximum Concurrent Threads for Import | 8 |
| * Maximum Concurrent Threads for Load | 8 |

09. Click on the Refresh link and verify the status



Import and Load Data

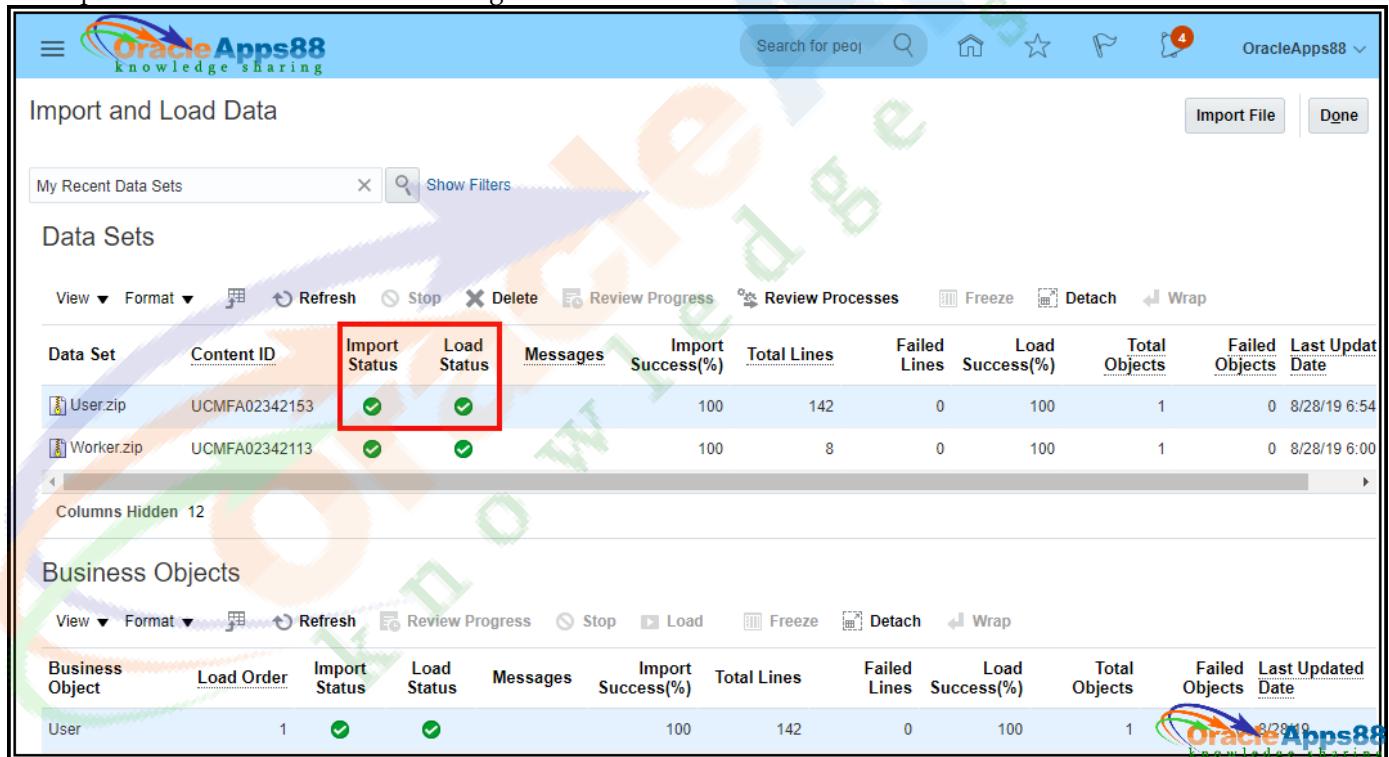
Data Sets

| Data Set | Content ID | Import Status | Load Status | Messages | Import Success(%) | Total Lines | Failed Lines | Load Success(%) | Total Objects | Failed Objects | Last Updated |
|------------|---------------|---------------|-------------|----------|-------------------|-------------|--------------|-----------------|---------------|----------------|--------------|
| User.zip | UCMFA02342153 | L | Lock | | 0 | 0 | 0 | 0 | 0 | 0 | 8/28/19 6:52 |
| Worker.zip | UCMFA02342113 | ✓ | ✓ | | 100 | 8 | 0 | 100 | 1 | 0 | 8/28/19 6:00 |

Business Objects

| Business Object | Load Order | Import Status | Load Status | Messages | Import Success(%) | Total Lines | Failed Lines | Load Success(%) | Total Objects | Failed Objects | Last Updated |
|-----------------|------------|---------------|-------------|----------|-------------------|-------------|--------------|-----------------|---------------|----------------|--------------|
| User | 1 | ■ | Lock | | 0 | 0 | 0 | 0 | 0 | 0 | 8/28/19 6:54 |

10. Import status and Load status is changed to Success.



Import and Load Data

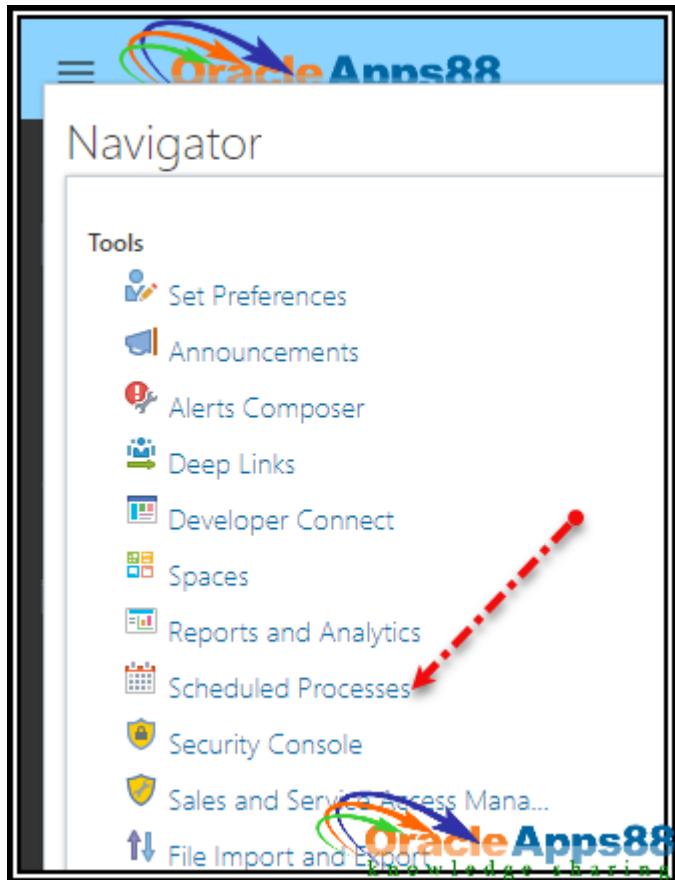
Data Sets

| Data Set | Content ID | Import Status | Load Status | Messages | Import Success(%) | Total Lines | Failed Lines | Load Success(%) | Total Objects | Failed Objects | Last Updated |
|------------|---------------|---------------|-------------|----------|-------------------|-------------|--------------|-----------------|---------------|----------------|--------------|
| User.zip | UCMFA02342153 | ✓ | ✓ | | 100 | 142 | 0 | 100 | 1 | 0 | 8/28/19 6:54 |
| Worker.zip | UCMFA02342113 | ✓ | ✓ | | 100 | 8 | 0 | 100 | 1 | 0 | 8/28/19 6:00 |

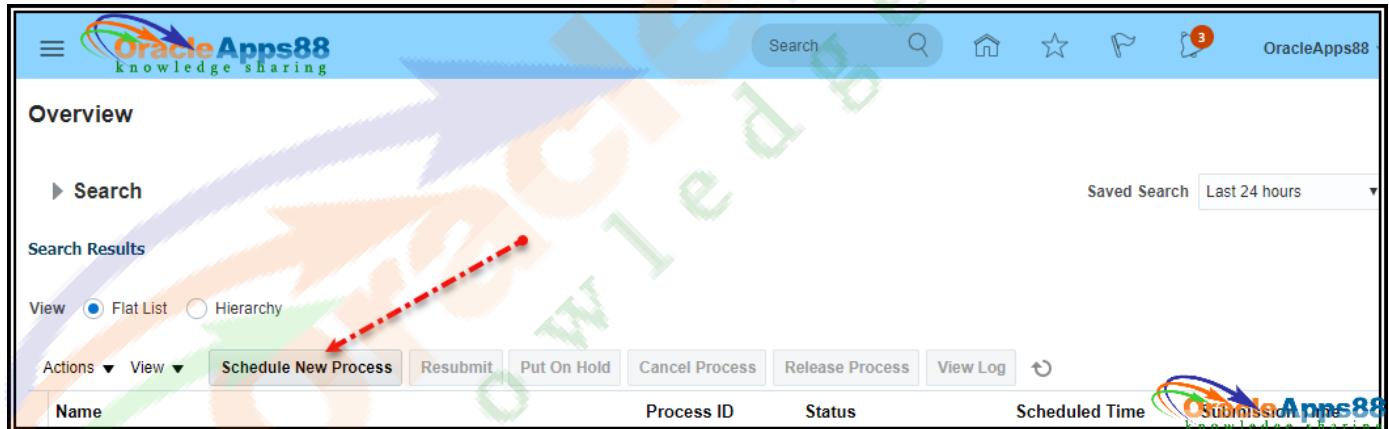
Business Objects

| Business Object | Load Order | Import Status | Load Status | Messages | Import Success(%) | Total Lines | Failed Lines | Load Success(%) | Total Objects | Failed Objects | Last Updated |
|-----------------|------------|---------------|-------------|----------|-------------------|-------------|--------------|-----------------|---------------|----------------|--------------|
| User | 1 | ✓ | ✓ | | 100 | 142 | 0 | 100 | 1 | 0 | 8/28/19 6:54 |

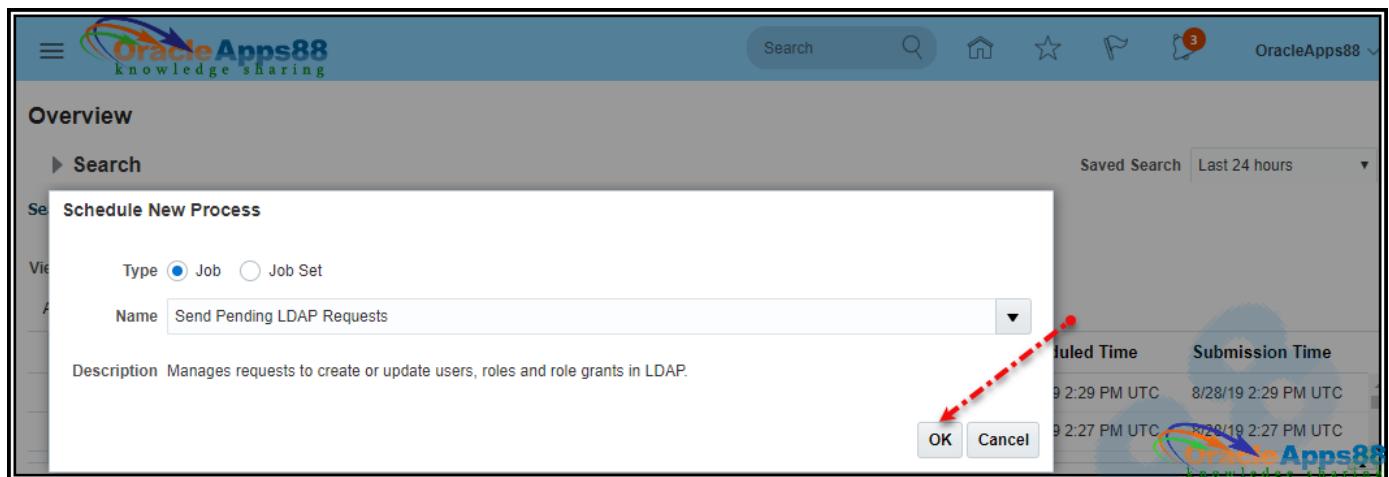
11. Submit the “Send Pending LDAP Requests” job to effect in application
Nav : Tools → Schedule Process



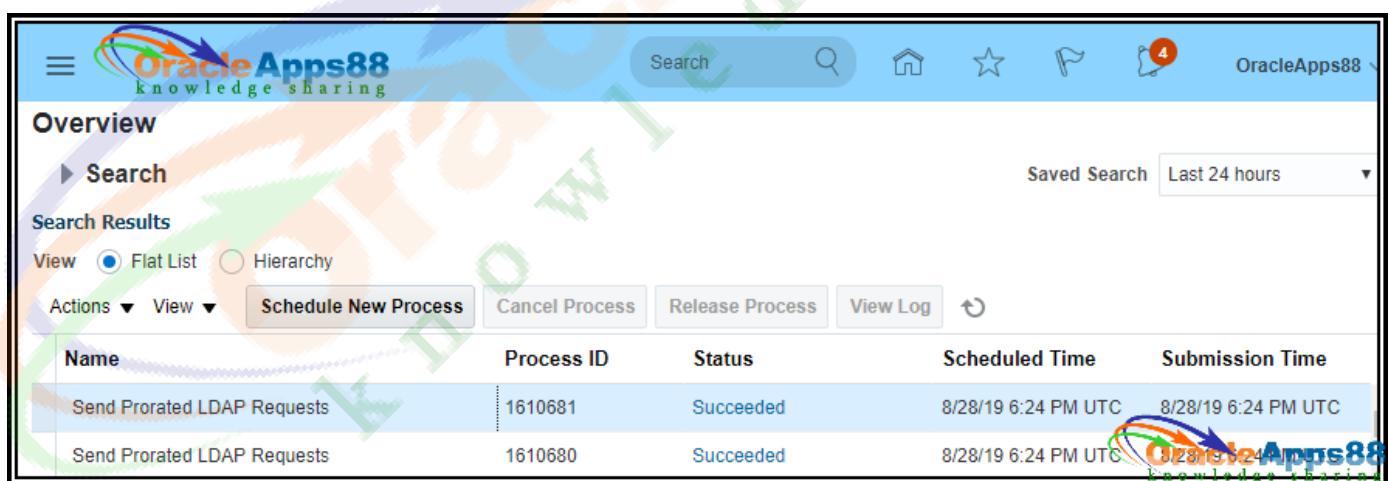
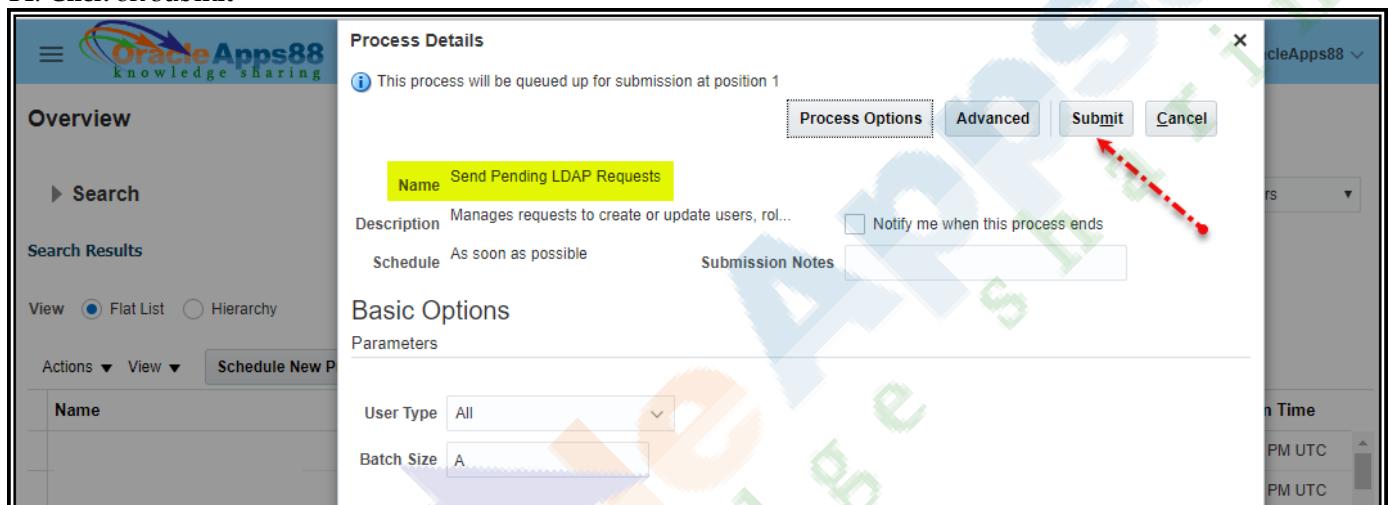
12. Click on Schedule New Process button



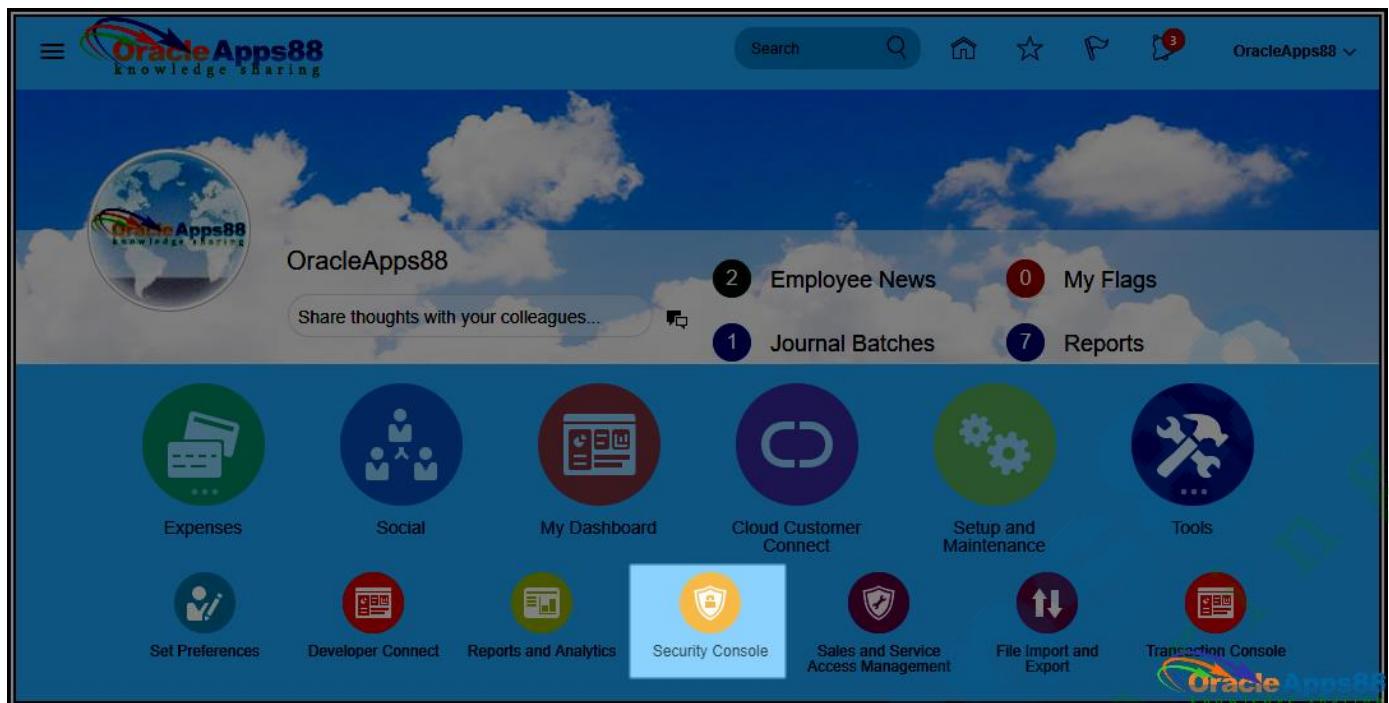
13. Select the "Send Pending LDAP Requests" job and click on ok



14. Click on submit



Verify the Roles in application
Navigate to: More... > Tools > Security Console.



Click on the Users tab

Enter Employee and select Search.

Select your user: OracleApps

| Display Name | User | Status | Action |
|--------------|------------|--------|-----------|
| OracleApps | OracleApps | Active | Locked No |

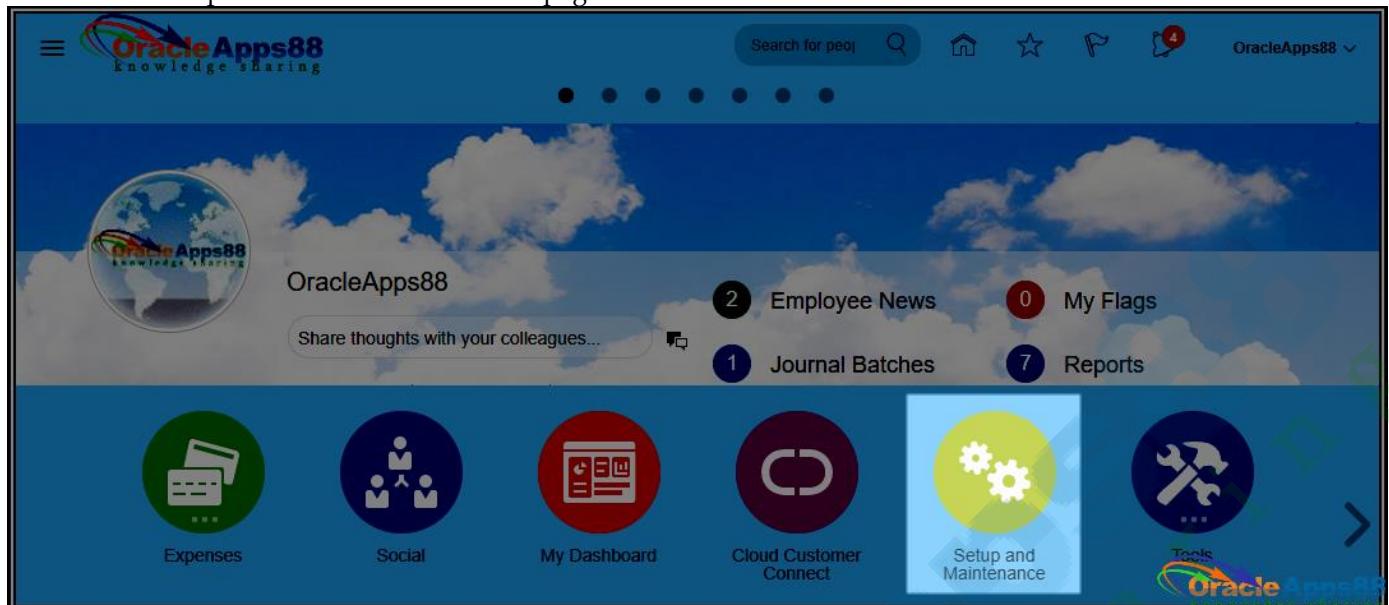
Verify the user roles

The screenshot shows the Oracle Fusion Middleware User Management interface. On the left, a sidebar menu includes Roles, Users, Analytics, Certificates, User Categories, Single Sign-On, and Administration. The main content area displays 'User Account Details: OracleApps' with tabs for User Information and Account Information. Under User Information, details like User Category (DEFAULT), User Name (OracleApps), First Name, Last Name (OracleApps), and Email (OracleApps88@yahoo.com) are shown. Under Account Information, there's a section for Password Expiration Date, Active (checked), and Locked. A red arrow points from the 'Edit' button to the 'Done' button. Below these tabs is a section for Associated Worker Information, listing Worker Name (OracleApps), Person Number, Manager (OracleApps88), Job (Administrator), Business Unit (US1 Business Unit), and Department (Finance US). At the bottom, a table lists Roles with columns for Role, Role Code, Assignable, and Auto-Provisioned. The roles listed are Accounts Payable Invoice Supervisor, Accounts Payable Manager, Accounts Payable Payment Supervisor, and Accounts Payable Specialist.

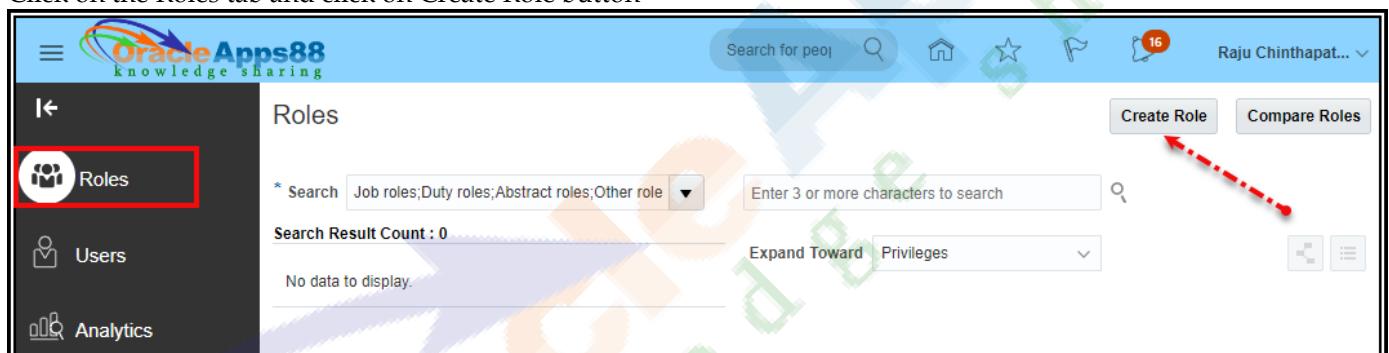
| Role | Role Code | Assignable | Auto-Provisioned |
|-------------------------------------|--|------------|------------------|
| Accounts Payable Invoice Supervisor | ORA_AP_ACCOUNTS_PAYABLE_INVOICE_SU... | No | No |
| Accounts Payable Manager | ORA_AP_ACCOUNTS_PAYABLE_MANAGER_J... | Yes | No |
| Accounts Payable Payment Supervisor | ORA_AP_ACCOUNTS_PAYABLE_PAYMENT_S... | No | No |
| Accounts Payable Specialist | ORA_AP_ACCOUNTS_PAYABLE_SPECIALIST_... | Yes | No |

05: Create Custom Role with View Privileges and add the role to User

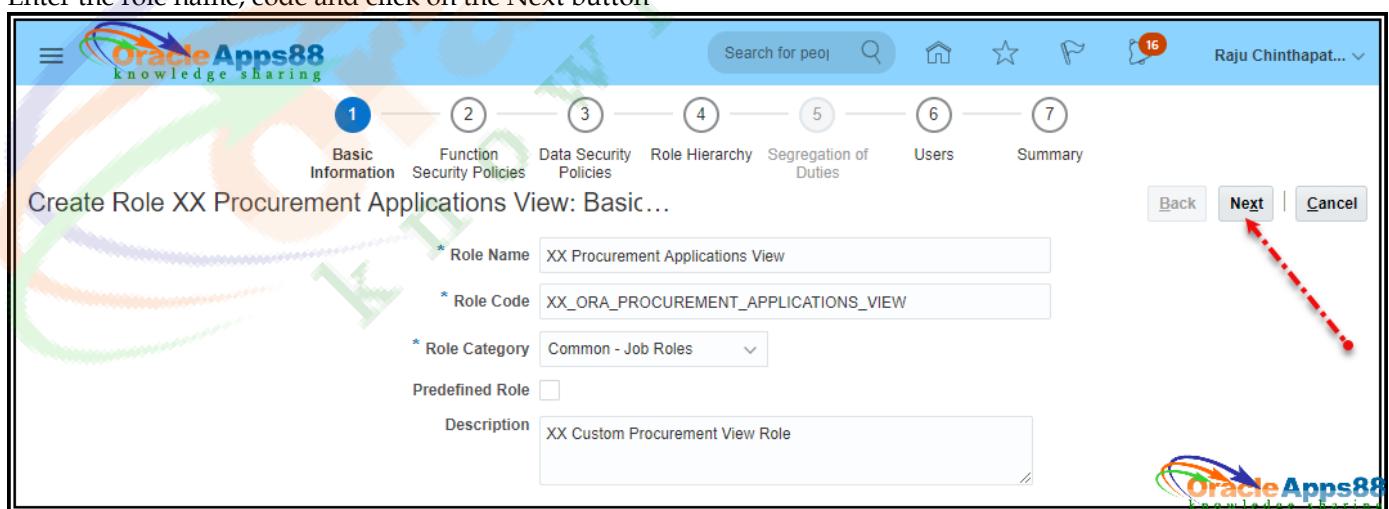
Creating the custom role to view only the purchase requisition, Purchase orders and receipt details
Click on the Setup and Maintenance in home page



Click on the Roles tab and click on Create Role button



Enter the role name, code and click on the Next button



Click on the Add Function Security button in Privileges tab

Create Role XX Procurement Applications View: Func...

Privileges Resources

+ Add Function Security Policy Delete Detach

| Privilege Name | Inherited from Role | Description |
|-------------------------|---------------------|-------------|
| No data to display. | | |
| Load Inherited Policies | | |

Details

Detach

| Resource Name | Description |
|---------------------|-------------|
| No data to display. | |

Search with Privilege, Select and click on Add Privilege to role button

Add Function Security Policy

* Search All View Requisition Diagnostics

Search Result Count : 1

| Name | Code | Description |
|------------------------------|------------------------------|---|
| View Requisition Diagnostics | POR_VIEW_REQDIAGNOSTICS_PRIV | Allows user view the requisition diagnostics. |

Add Selected Privileges Add Privilege to Role Cancel

Once the Privileges are added click on Next button

Create Role XX Procurement Applications View: Func...

Privileges Resources

+ Add Function Security Policy X Delete E Detach

| Privilege Name | Inherited from Role | Description |
|---|---------------------|---|
| View Purchase Order Receipts | | Allows viewing of landed cost charges and item cost by purchase order receipts. |
| View Purchase Order as Procurement Requester | | Allows a procurement requester to review a purchase order. |
| View Receiving Notification as Buyer | | Allows viewing of receiving notification details by a buyer. |
| View Receiving Option by Web Service | | Allows viewing receiving parameters using web service. |
| View Receiving Receipt Lines to Put Away by Web Service | | Allows viewing receipt lines to put away using web service. |
| View Receiving Receipt Notification | | Allows viewing of receipt notifications. |
| View Requisition | | Allows users to view requisition details. |
| View Requisition - All | | Allows users to view all requisitions in the authorized business units. |
| View Requisition Details as Buyer | | Allows users to view requisition details as buyer. |

Add if any security polices, Click on Next

Create Role XX Procurement Applications View: Data ...

View ▾ + Create Data Security Policy E Detach

| Policy Name | Policy Description | Data Resource | Privilege | Condition |
|---------------------|--------------------|---------------|-----------|-----------|
| No data to display. | | | | |

Add the Inherited role, Click on the Add Row button

Create Role XX Procurement Applications View: Role ...

View ▾ + Add Role X Delete E Export to Excel E Detach

| Role Name | Role Code | Inherited by Role Name | Inherited by Role Code |
|----------------------------------|-----------------------------------|------------------------|------------------------|
| XX Procurement Applications View | XX_ORA PROCUREMENT APPLICATION... | | |

Select the Role and Add

Create Role XX Procurement Applications View

Add Role Membership

Search Result Count : 1

| | |
|-------------|---|
| Name | View Purchase Order |
| Code | PO_VIEW_PURCHASE_ORDER_PRIV_OBI |
| Description | Allows a user to review a purchase order. |

Role Name: XX Procurement Applications View

Add Role Membership | Cancel

Once role is inherited, click on Next button

Create Role XX Procurement Applications View: Role ...

Basic Information | Function Security Policies | Data Security Policies | Role Hierarchy | Segregation of Duties | Users | Summary

View | + Add Role | X Delete | Export to Excel | Detach

| Role Name | Role Code | Inherited by Role Name | Inherited by Role Code |
|---------------------|---------------------------------|----------------------------------|--------------------------------|
| View Purchase Order | PO_VIEW_PURCHASE_ORDER_PRIV_OBI | XX Procurement Applications View | XX_ORA PROCUREMENT APPLICATION |

Select the User, If this role is specific to particular users only

Create Role XX Procurement Applications View

Add User

Search Result Count : 1

| | |
|------------|--------------|
| User Login | OracleApps88 |
|------------|--------------|

Add Selected Users | Add User to Role | Cancel

Click on next button

Create Role XX Procurement Applications View: Users

| User Login | Display Name | Description |
|---------------------|--------------|-------------|
| No data to display. | | |

Add User

Review the details and click on Save and Close button

Create Role XX Procurement Applications View: Sum...

Function Security Policies: Added (11), Removed (0)

Privilege Name

- Create Self-Service All Requisition Receiving Receipt
- View Purchase Order Receipts
- View Purchase Order as Procurement Requester
- View Receiving Notification as Buyer
- View Receiving Option by Web Service
- View Receiving Receipt Lines to Put Away by Web Service

Data Security Policies: Added (0), Removed (0)

Role Hierarchy: Added (1), Removed (0)

Role Name

- View Purchase Order

Users: Added (0), Removed (0)

Action

Save and Close

Verify the custom role in Roles tab

The screenshot shows the Oracle Apps 88 Roles page. On the left sidebar, there are links for Roles, Users, Analytics, Certificates, and User Categories. The main content area is titled 'Roles' and shows a search bar with 'Search for people' and a dropdown menu 'Job roles;Duty roles;Abstract roles;Other role'. A search result for 'XX Procurement Applications View' is displayed, with details: Name: XX Procurement Applications View, Code: XX_ORA PROCUREMENT APPLICATION, Description: XX Custom Procurement View Role. Below this, a table lists roles with columns: Role Name, Role Code, Inherited by Role Name, and Inherited by Role Code. Buttons for 'Create Role' and 'Compare Roles' are at the top right.

Adding the custom role to User

Move to the Users tab and select the User, edit and click on Add role button

Search with above create custom role and click on **Add Role Membership** button

The screenshot shows the Oracle Apps 88 Edit User Account page for 'Raju Chinthapatla'. The left sidebar has links for Roles, Users, Analytics, and Administration. The main area shows user information and a 'Roles' section. A modal dialog titled 'Add Role Membership' is open, showing a search bar with 'Search for people' and a dropdown menu 'Job roles;Duty roles;Abstract roles;Other role'. A search result for 'XX Procurement Applications View' is shown with details: Name: XX Procurement Applications View, Code: XX_ORA PROCUREMENT APPLICATIONS_VIEW. At the bottom of the dialog are 'Add Role Membership' and 'Done' buttons. A red arrow points to the 'Add Role Membership' button.

Once the role is added to user click on Save and Close button

OracleApps88 knowledge sharing

Search for people Home Star Flag 16 Raju Chinthapatla

Edit User Account: OracleApps88

User Information

User Category: DEFAULT

* User Name: OracleApps88

First Name:

* Last Name: OracleApps88

Email: OracleApps88@Yahoo.com

Account Information

Password Expiration Date: 11/26/19

Active Locked

Associated Worker Information

Worker Name: OracleApps88

Person Number: EMP001001

Manager: Casey Brown

Job: Administrator

Business Unit: US1 Business Unit

Department: Finance US

Roles

Add Role Add Auto-Provisioned Roles

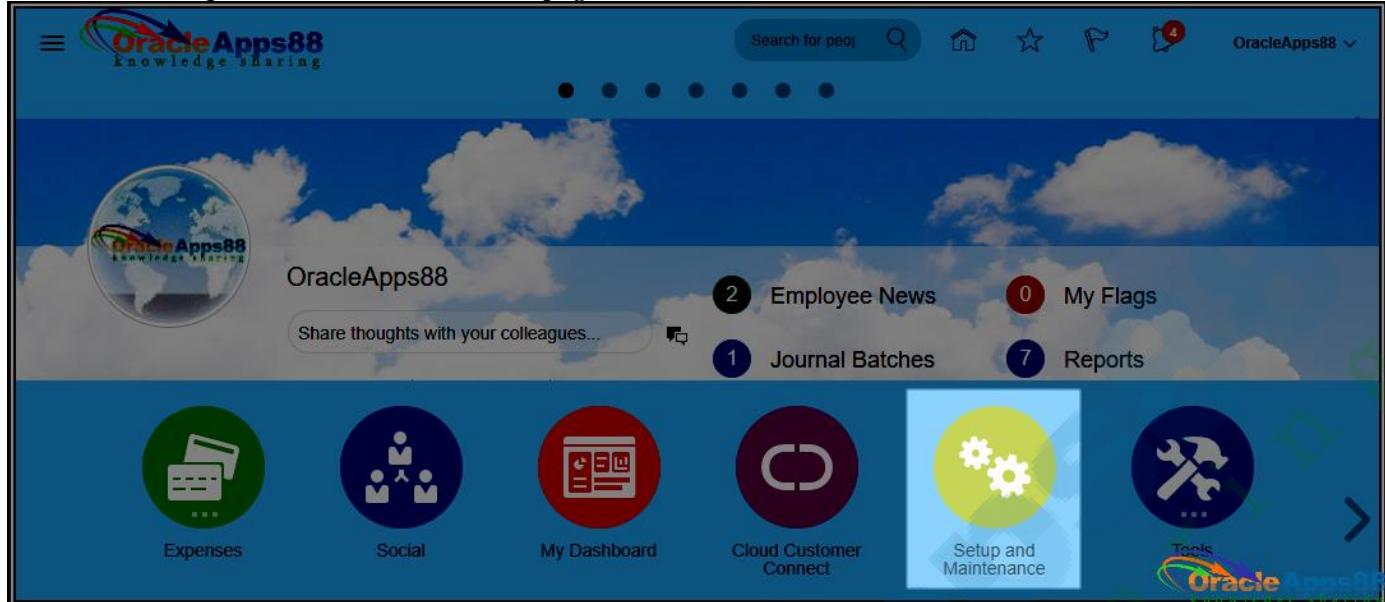
| Role | Role Code | Assignable | Auto-Provisioned |
|----------------------------------|---------------------------------|--------------------------|--|
| XX Procurement Applications View | XX_ORA PROCUREMENT_APPLICATI... | <input type="checkbox"/> | <input checked="" type="checkbox"/> <input type="checkbox"/> |

Save and Close Cancel

06: Verify the user in Manager Users

Verify the user details in Manage Users page

Click on the Setup and Maintenance in home page



Search with Manage Users task

Search with User and click on the user link

The screenshot shows a search interface for 'OracleApps'. The search bar contains 'OracleApps' and the 'Advanced' button is highlighted with a red arrow. The 'Selected Filters' section indicates no filters are selected. The 'Search Results' section shows one entry: 'OracleApps' with the email 'OracleApps88@Yahoo.com'. A red arrow points to the 'Show Photo' button next to the result.

Verify the user details and click on Cancel

Edit User:OracleApps

Personal Details

| | | | |
|--------------|------------|-----------|------------------------|
| * Last Name | OracleApps | Email | OracleApps88@yahoo.com |
| First Name | | Hire Date | 1/1/18 |
| Middle Names | | Phone | (+91) 9059574321 |
| Title | | Work Fax | |

User Details

| | |
|--|---|
| <input checked="" type="radio"/> Enter user name | <input type="radio"/> Link user account |
| User Name | OracleApps |
| * Active | Active |

Employment Information

| | | | |
|-----------------|-------------------|------------|--------------|
| * Person Type | Employee | Department | Finance US |
| Legal Employer | US1 Legal Entity | Location | Chicago |
| * Business Unit | US1 Business Unit | Mail Stop | |
| Job | Administrator | Manager | OracleApps88 |
| Grade | | | |

Resource Information

Roles

Role Requests

Role Requests in the Last 30 Days

Current Roles

View ▾ Format ▾ Autoprovision Roles

| Role Name | Start Date | Provisioning Method |
|-----------------------------------|------------|---------------------|
| Buyer | 8/28/19 | Manual |
| Procurement Catalog Administrator | 8/28/19 | Manual |
| Procurement Preparer | 8/28/19 | Manual |
| Procurement Requester | 8/28/19 | Manual |
| Supplier Demand Planner | 8/28/19 | Manual |

Click on the Actions and Click on the Manage Expense Information to verify the expense details

Screenshot of the Oracle Apps search interface. The search bar shows 'Keywords: OracleApps'. The search results list two users: 'Administrator (2)' under 'Finance US (2)' and 'Job'. A context menu is open over the first user, with 'Manage Expense Information' highlighted by a red arrow.

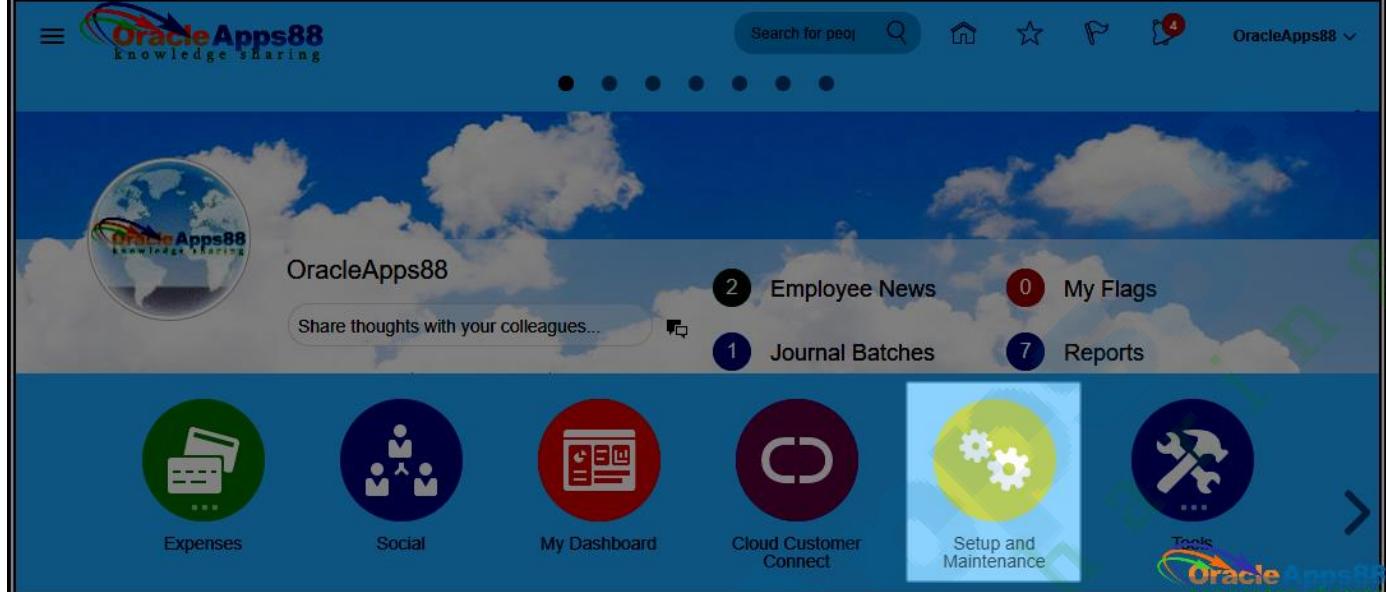
Verify the details and click on cancel button

Screenshot of the 'Edit User:OracleApps' page. It shows the 'Addresses' and 'Expenses Information' sections. Under 'Expenses Information', the 'Default Expense Account' is set to '101.10.60511.000.000.000' and the 'Expense Check Send-to Address' dropdown is empty. A red arrow points to the 'Cancel' button in the top right corner.

07: Add Business Unit Data Access to User.

You can assign users access to appropriate data based on their job roles. The Oracle Fusion security model requires a three-way link between users, role, and data. It is summarized as: who can do what on which data. Who refers to the users, what are the job roles the user is assigned, and which refers to the data that is specific to a particular security context, typically an element of the enterprise structure, such as a business unit, asset book, or ledger.

Navigator/Home → Setup and Maintenance



Search for "Manage Data Access for Users" Click on the link

Example: In Oracle Fusion Payables you secure access to invoices and payments by business unit. You can access invoices and payments for viewing or processing only in the business units to which you have permission. The permission must be explicitly granted to each user. Select a User Name and Role you want to give Business Unit access to.

Click Search

Click the + icon to create data access to User.

Manage Data Access for Users

1 Users without Data Access Users with Data Access

2 * User Name Raju.Chinthapatla

3 Search

4 Authorize Data Access

| User Name | Role | Security Context | Security Context Value |
|-------------------|-----------------------|------------------|------------------------|
| Raju.Chinthapatla | Expense Audit Manager | Business unit | |
| Raju.Chinthapatla | Procurement Manager | Business unit | |
| Raju.Chinthapatla | Procurement Manager | Data access set | |

In the field Security Context Value select the business unit you want give permission.
Click Save and Close

Manage Data Access for Users

Create Data Access for Users

1 Users without Data Access

2 Security Context

3 Search

4 Save and Close

| User Name | Role | Security Context | Security Context Value |
|------------|------------------|------------------|------------------------|
| Raju.Chint | Accounts Payable | Business unit | US1 Business Unit |

Select now Users with Data Access and click Search again. Note that Business Unit was assigned to User

The screenshot shows the 'Manage Data Access for Users' page. At the top, there are two radio buttons: 'Users without Data Access' (unchecked) and 'Users with Data Access' (checked). A red box labeled '1' highlights the checked radio button. Below it is a dropdown menu for 'Security Context' set to 'All'. The search section contains fields for 'User Name' (containing 'Raju.Chinthapatla') and 'Role' (containing 'Accounts Payable Invoice S'). A red box labeled '2' highlights the 'User Name' field. To the right, there's a note: '** At least one is required'. On the far right, there are three buttons: 'Search' (highlighted with a red box labeled '3'), 'Reset', and 'Save...'. The main area is titled 'Search Results' and displays a table with columns: User Name, Role, Security Context, and Security Context Value. One row is shown: Raju.Chinthapatla, Accounts Payable Invoice Supervisor, Business unit, US1 Business Unit.

You can also assign Data Access to Users by using a Spreadsheet.

In Manage Data Access for Users click on "Authorize Data Access" it will download an Excel sheet.
To Use this feature your user Login should have "IT Security Manager" Role assigned.

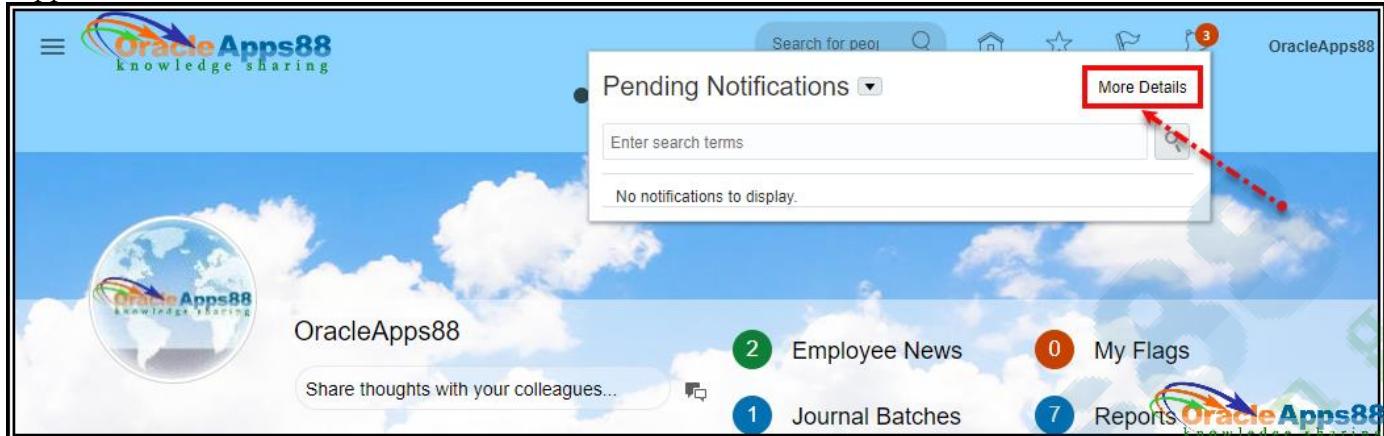
This screenshot is similar to the previous one but includes a red dashed arrow pointing from the text above to the 'Authorize Data Access' button in the search results section. The rest of the interface and data are identical to the first screenshot.

Go to Tools -> Download Desktop Integration it will download ADF Software. Install it and Open Excel sheet it will ask for your Cloud User credentials.

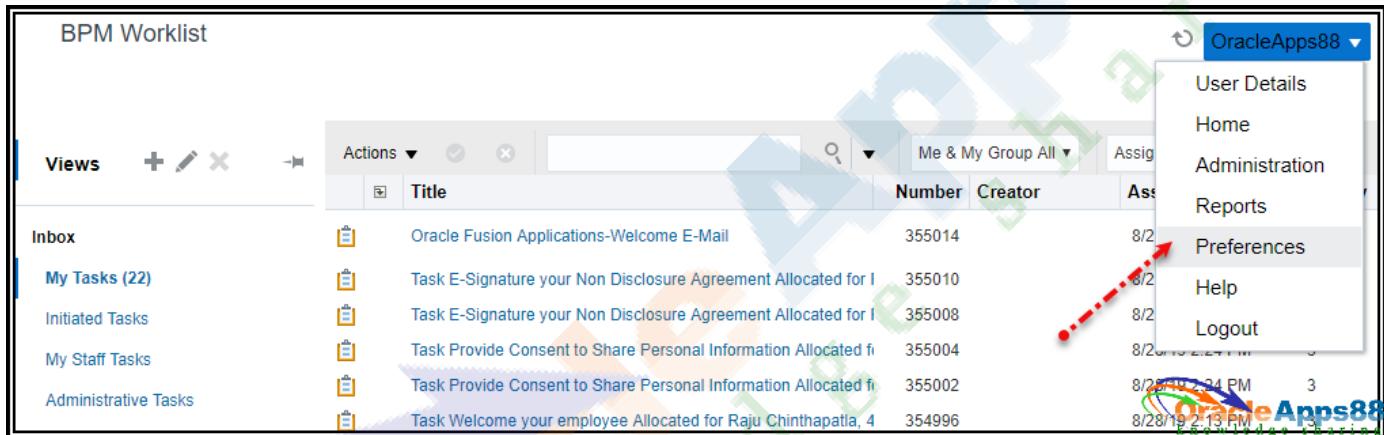
Fill the data in correct format with any Space. To add Row in ADF excel sheet use **Ctrl+Shift++**.
After you entered all information's click on the Upload icon

08: Setup Vacation Rule for a User

Example: How can an administrator setup vacation rule for an employee already on vacation and forgot to set vacation rules, including reassign all tasks regarding Procurement to someone else within a specific period?
 Application Home -> Bell Icon Notifications -> More details

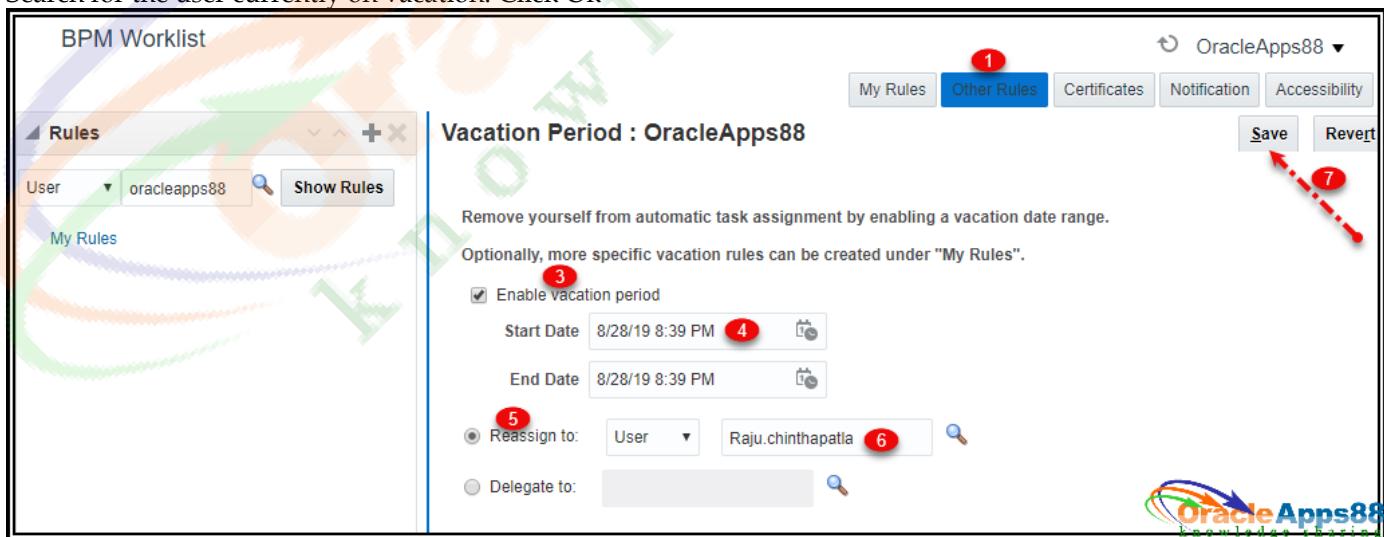


Go to Preferences



Click on Other Rules tab

Search for the user currently on vacation. Click Ok



Click on Show Rules

Click the + icon to create a rule for this user. Select the period during which the rule should be active. Enter all fields as needed and make sure not to check "Use as vacation rule" if you want to define start and end date for the rule.

Note: You can also setup rules for specific tasks if you select 'Tasks matching these conditions' instead of 'All Tasks'. Example on My Oracle Support: **How To Setup A Vacation Rule For Journal Approval Process In Fusion Financials (Doc ID 1490639.1)**

Click Save

BPM Worklist

OracleApps88 ▾

My Rules Other Rules Certificates Notification Accessibility

Save Revert

Rules

User oracleapps88 Show Rules

My Rules

User Rule

Name * User Rule
 Use as vacation rule

Execute rule only between these dates:

Start Date m/d/y h:mm a
End Date m/d/y h:mm a

TASKS Tasks matching these conditions

Match All Any +

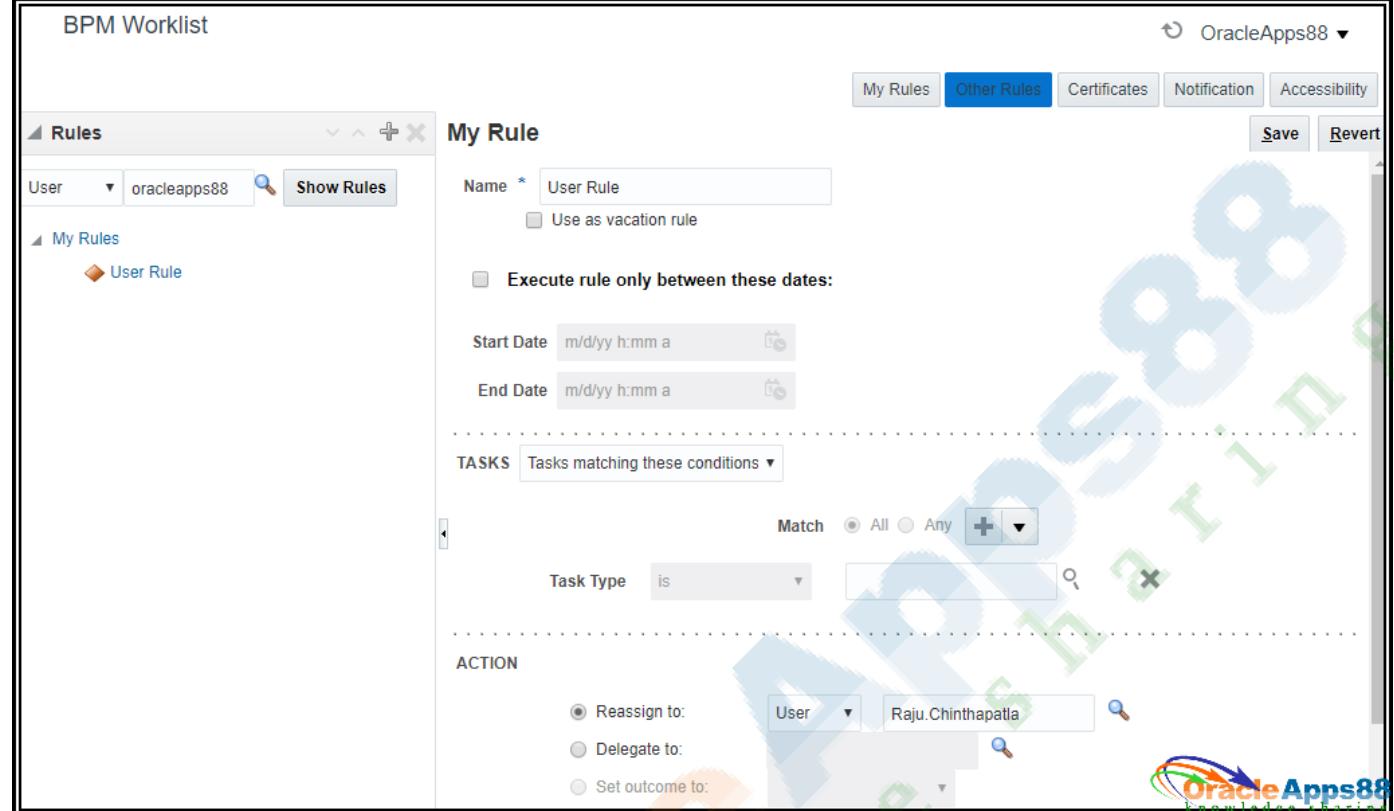
Task Type is

ACTION

Reassign to: User Raju.Chinthapatla

Delegate to:
Set outcome to:

OracleApps88 Knowledge sharing



09: Printer Setup

Note: Document references, FAQ's and more on My Oracle Support: **Setup Instructions for Printing from Oracle Cloud (Doc ID 1964157.1)** The purpose of this document is to assist Fusion Applications customers with printing directly from the cloud to a on premise printer. Document on My Oracle Support is being continually being kept up to date and expanded.

1. Contact Oracle ISM (Implementation Success Manager) resource for the data center location where test and prod instances are located. (Ex. Chicago Data Center). Using the below table and create a whitelisting entry on your firewall to allow traffic from those IP addresses.
2. A "Printer Server" need to be setup – a windows based server is preferred over Linux/Unix CUPS server. This server must have SSL certificate installed on it to allow HTTPS traffic. The SSL certificate must be issued by recognized certificate issuing authority (godaddy is a valid one). This printer server needs to meet these requirements:
 - a. Must be HTTPS enabled / SSL certificate installed
 - b. Must have "Basic" or "Digest" mode of security enabled. Any other security mode will lead to Error from Oracle Side
 - c. Must have authentication enabled (userid/password, that will be needed during printer registration)
 - d. Confirm at least one printer is connected thru the printer server, available to print from Oracle Cloud ERP.
3. Printer server and printer details of the customer.
 - a. Printer Server URL, IP Address. Printer server should be reachable from any browser using the syntax https://<printer_server_url>. Example: <https://print.server.com>
 - b. Printer Name. Example: FinPrnt1
 - c. This will allow us to reach the printer using the syntax https://<printer_server>/printers/<printer_name>/.printer Example: <https://print.server.com/printers/FinPrnt1/.printer>
 - d. Enter userid/password when prompted. You should now be able to see printer details. This confirms that printer access details are correct.
4. Register the printer. Go to BI Admin page. Use this URL to reach the BI Admin Page.
 - a. <https://machine.domain.com/xmlpserver>
Example: <https://efww-test.fs.em2.oraclecloud.com/xmlpserver>
 - b. Printer URI = ipp://<printer_server>/printers/<printer_name>/.printer
 - c. Use the userid/password to complete the registration

Enter the following values:

Printer Name - <any name you want>

URI - ipp://<printer url>/printers/<printer_name>/.printer **URI must have the ipp:// prefix. DO NOT use HTTP:// prefix.**

Userid - userid for the printer server

Password - password for the printer server

Click Apply to save. Click Cancel to exit after saving.

Example:

5. Install printer SSL certificates in Fusion truststore
 - a. Refer to [How To Install End Point URL SSL Certificates In Default Fusion Truststore \(Doc ID 2120300.1\)](#) for details
 - b. If required, please log a service request with Oracle Support to enable HTTPS PROXY as mentioned within [Doc ID 2120300.1](#)
 - c. This completes the printer setup in Fusion Applications.
6. Test the printer configuration.

- a. To test printing, please run any Fusion ESS report (e.g., Payables Invoice Register) and redirect the print output to the newly setup printer to verify the setup.

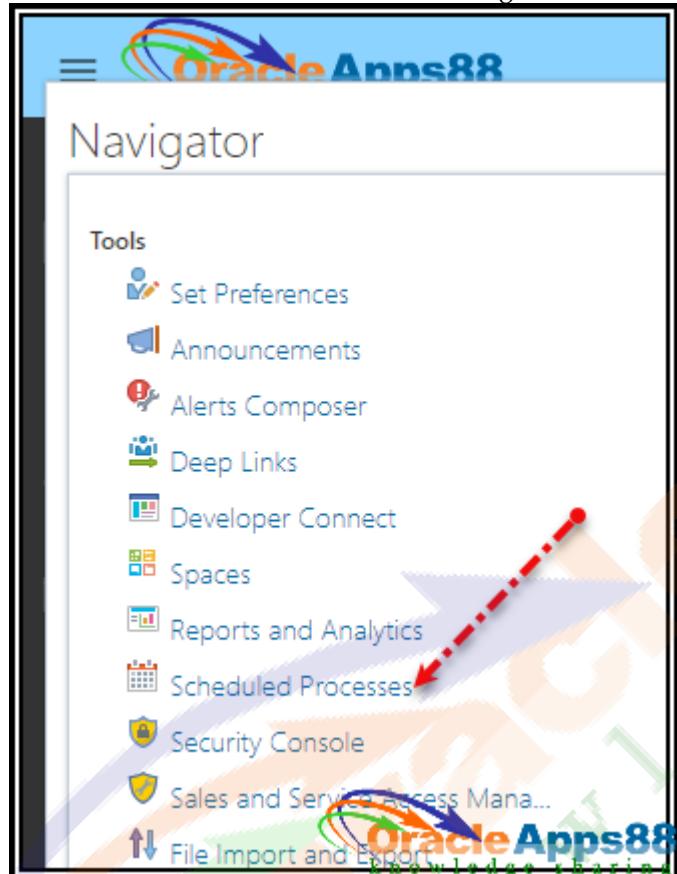


10: Run User and Roles Synchronization Process.

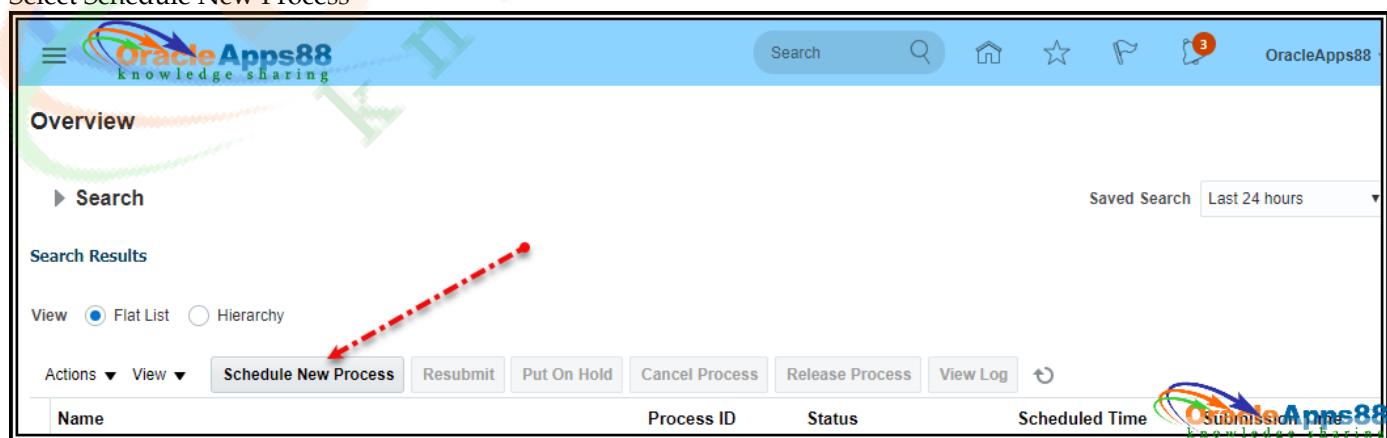
Information about users and roles in your LDAP directory is available automatically to Oracle Cloud Applications. However, in specific circumstances you're recommended to run the Retrieve Latest LDAP Changes process. This topic describes when and how to run Retrieve Latest LDAP Changes. You run Retrieve Latest LDAP Changes if you believe data-integrity or synchronization issues may have occurred between Oracle Cloud Applications and your LDAP directory server. For example, you may notice differences between roles on the Security Console and roles on the Create Role Mapping page.

Example: Sometimes the users will say, oh I can't see my roles after creation of all allocation of grants in Oracle Cloud. If you hit these kinds of issues, then you have to run User and Roles Synchronization Process.

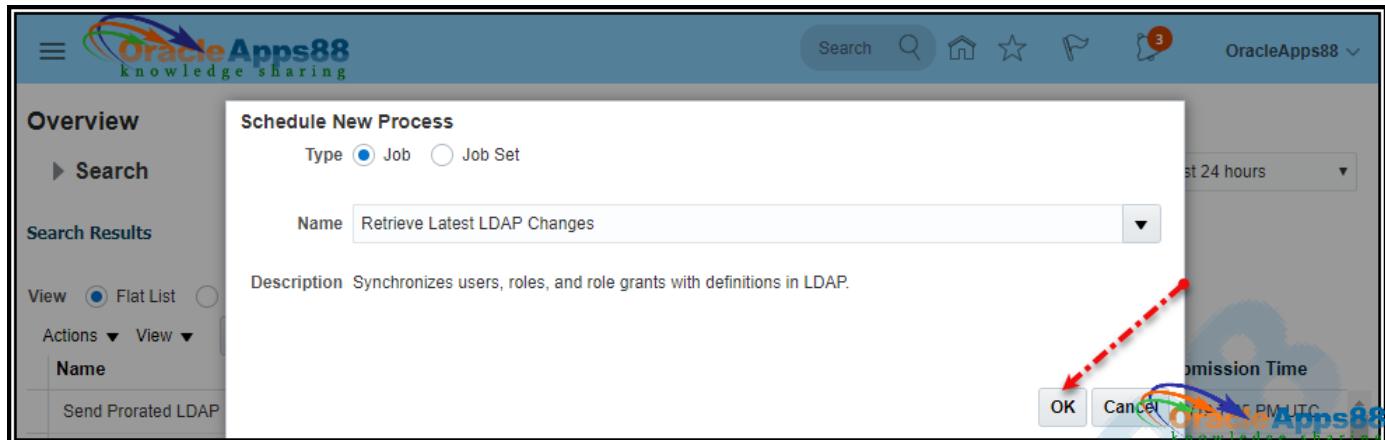
Note: This is usually a scheduled process which runs twice a day
Select Scheduled Processes from the Navigator.



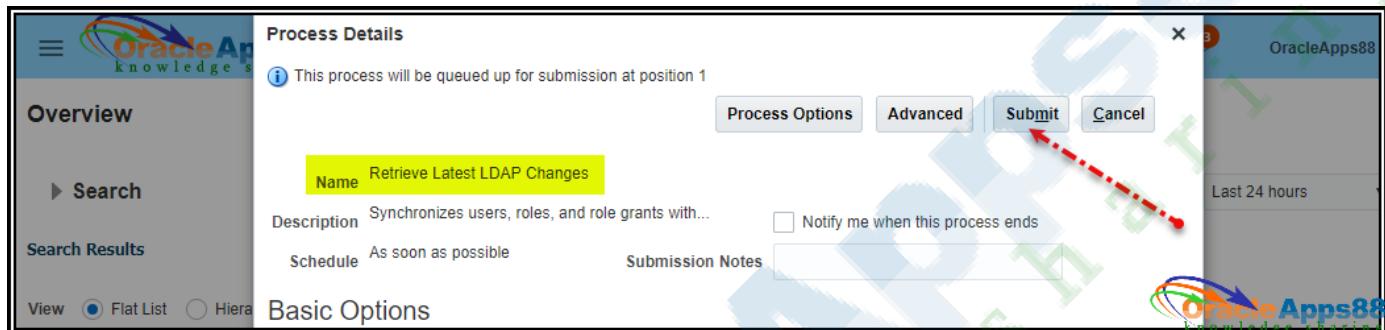
Select Schedule New Process



Select the appropriate process name. Click OK



Within the next window click Submit



Click 'Refresh' icon until 'Status' is listed as 'Succeeded'
Click on the link in the Log and Output area to view output files

11: Setup the Manage Procurement Agent

Procurement agents are typically users with procurement roles, such as:

- Buyer
- Catalog Administrator
- Category Manager
- Procurement Contract Administrator
- Procurement Manager
- Supplier Administrator
- Supplier Manager
- Supplier Qualification

They have procurement job responsibilities in the buying organization, such as creating purchase agreements, purchase orders, and related procurement functions. You must set up these users as procurement agents for them to manage procurement documents and perform other procurement actions.

You use the Manage Procurement Agents task to create and maintain a procurement agent's access to procurement functionality for a business unit. You can find the task in the Purchase Agreements and Purchase Orders work areas.

You can implement document security for individual document types, such as purchase orders, purchase agreements, and requisitions. You can also control a procurement agent's access to manage activities for suppliers, negotiations, catalog content, and business intelligence spend data.

The configuration assigns an access level to documents owned by other procurement agents for each procurement business unit.

Note: An agent can perform all actions on his own documents as long as he has procurement BU access.

None: The agent has no access to documents owned by other agents.

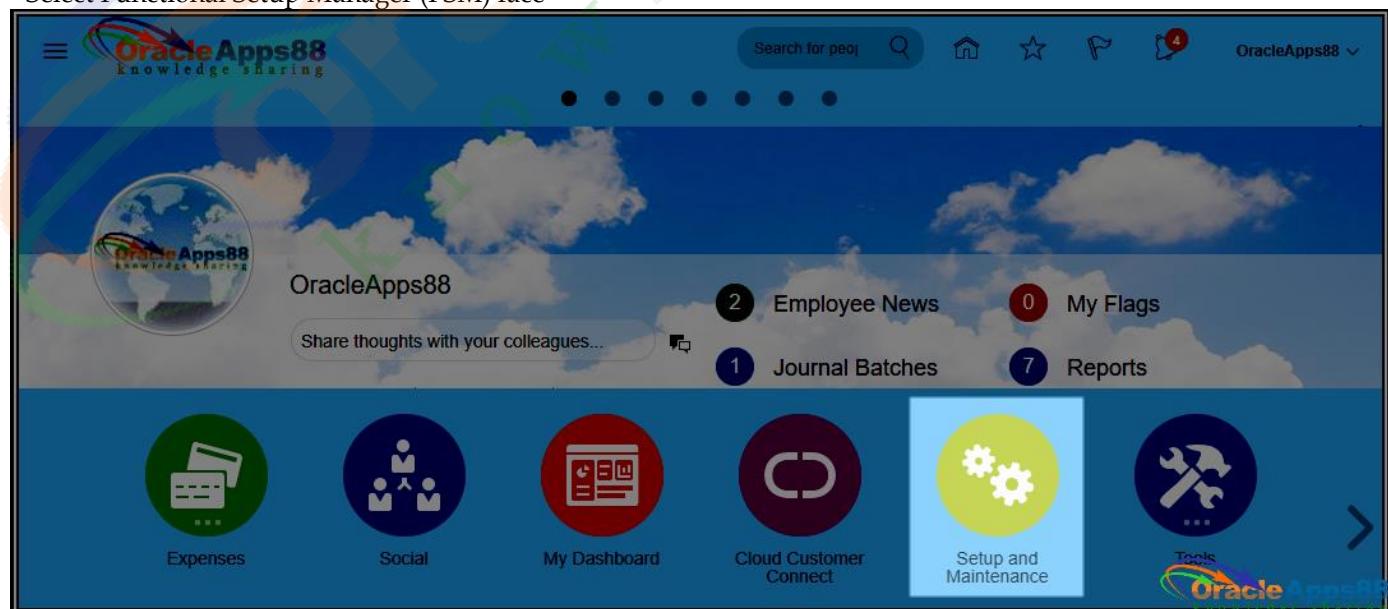
View: Permits the agent to search and view other agents' documents.

Modify: Permits the agent to view, modify, delete, and withdraw other agents' documents.

Full: Permits the agent full control of other agents' documents. This includes the view, modify, delete, withdraw, freeze, hold, close, cancel, and finally close actions.

The buyer agent is granted access to the Manage Supplier functionality in the Manage Procurement Agent page

- Login with an username with access to Functional Setup Manager
- Select Functional Setup Manager (FSM) face



- In All Tasks Tab, search for "Manage Procurement Agent"

- Click on Manage Procurement Agent task

The screenshot shows the Oracle Fusion Procurement Foundation interface. On the left, there's a sidebar titled 'Functional Areas' with options like Purchasing Categories, Suppliers, Approval Management, Procurement Foundation, Items, Purchasing Foundation, and Procurement Transaction Account Rules. A red dashed arrow points from the sidebar to the 'Manage Procurement Agents' task listed under the 'Task' section on the right. The 'Task' section also includes other tasks such as Manage Payment Terms, Manage Units of Measure, Manage Carriers Lookups, and Manage Carriers.

Click on Add button

The screenshot shows the 'Manage Procurement Agents' page. It has search filters for Procurement BU (US1 Business Unit), Agent, and Status. Below the filters is a table titled 'Search Results' with columns: Procurement BU, Agent, Default Requisitioning BU, and Status. Two rows are visible: one for Arrendondo, Rosario (Status: Active) and another for Brown, Casey (Status: Active). A red dashed arrow points to the 'Add' button (+) located at the top left of the table area.

| Procurement BU | Agent | Default Requisitioning BU | Status |
|-------------------|---------------------|---------------------------|--------|
| US1 Business Unit | Arrendondo, Rosario | US1 Business Unit | Active |
| US1 Business Unit | Brown, Casey | US1 Business Unit | Active |

By default, the suppliers for which the agent is granted access is based on the business unit setups. And Supplier Sites are assigned to certain business units in the site assignments.

All of these setups work together to determine which suppliers and supplier sites the buyer agent can manage or view.

If you have France setup as a Business Unit and Italy setup as a Business Unit you may control the access via the Business Unit setup for the buyer agent, or otherwise you may control the access at the individual Supplier Site setups.

Select the BU, User and select the Access and click on Save and Close

Edit Procurement Agent: OracleApps88

Procurement BU US1 Business Unit
Agent OracleApps88

Default Requisitioning BU US1 Business Unit
Default Printer
Status Active

Agent Access

View ▾

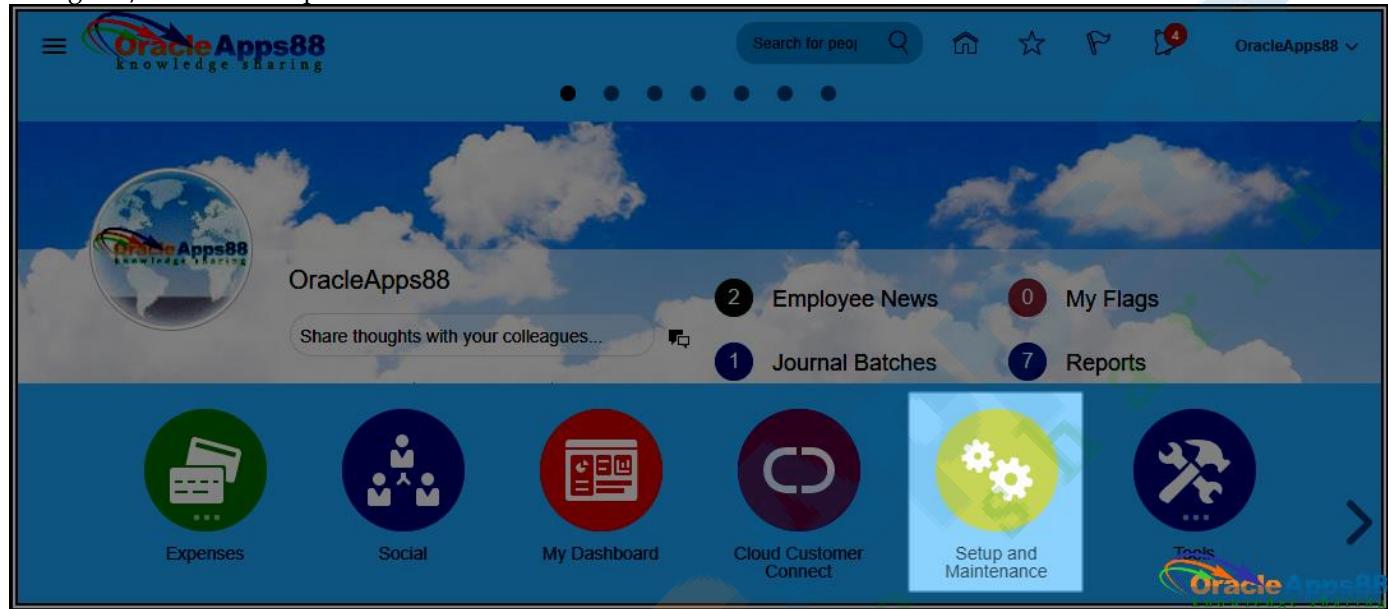
| Action | Allowed | Access to Other Agents' Documents |
|---------------------------------------|-------------------------------------|-----------------------------------|
| Manage Requisitions | <input checked="" type="checkbox"/> | Full |
| Manage Purchase Orders | <input checked="" type="checkbox"/> | Full |
| Manage Purchase Agreements | <input checked="" type="checkbox"/> | Full |
| Manage Negotiations | <input checked="" type="checkbox"/> | Full |
| Manage Sourcing Programs | <input checked="" type="checkbox"/> | Full |
| Manage Catalog Content | <input checked="" type="checkbox"/> | Not Applicable |
| Manage Suppliers | <input checked="" type="checkbox"/> | Not Applicable |
| Manage Supplier Qualifications | <input checked="" type="checkbox"/> | Full |
| Manage Approved Supplier List Entries | <input checked="" type="checkbox"/> | Not Applicable |
| Analyze Spend | <input checked="" type="checkbox"/> | Not Applicable |

12: Creating a Descriptive Flexfields

If you need to add company-specific attributes to a business object, such as size and color attributes for the product business object, then you can often use flexfields to add the desired custom attributes. A flexfield is a set of placeholder fields (segments) that is associated with a business object. Oracle Fusion Applications provides three types of flexfields – descriptive flexfield, extensible flexfield, and key flexfield. This chapter discusses how you can use descriptive and extensible flexfields to add additional attributes to Oracle Fusion applications. This chapter refers to these attributes as custom attributes.

Creating a Descriptive Flexfield for AP Invoice

Navigator/Home → Setup and Maintenance



Search with Manage Payables Descriptive Flexfields task

Search the Flexfield code and select the code and click on Edit button

Manage Payables Descriptive Flexfields

Search

Name:

Flexfield Code: AP_INVOICES 1

Module: 2

Search Results

| Name | Type | Module | Flexfield Code | Entity Usages | Description | Deployment Status |
|------------------------|-----------------------|----------|---|---------------|--------------------------------|-------------------|
| Invoices | Descriptive Flexfield | Payables | AP_INVOICES 3 | | Fields for invoice details ... | |
| Invoice Gateway Header | Descriptive Flexfield | Payables | AP_INVOICES_INTERFACE | | Fields for invoice details ... | |

Actions: View, Format, Freeze, Detach, Wrap, Deploy Flexfield

Click on the add button in Global Segments

Edit Descriptive Flexfield: Invoices

Name: Invoices
Flexfield Code: AP_INVOICES
Description: Fields for invoice details on the invoice page.

Segment Separator: .
Application: Payables
Module: Payables

Global Segments

| * Sequence | Name | Table Column | Value Set | Prompt |
|---------------------|------|--------------|-----------|--------|
| No data to display. | | | | |
| Columns Hidden: 9 | | | | |

Actions: View, Format, +, X, Freeze, Detach, Wrap

Enter the DFF details and click on Save and Close

Create Segment

| | | | |
|--|--|---|---|
| Flexfield Name | Invoices | Flexfield Code | AP_INVOICES |
| * Name | Project Name | Description | |
| * Code | Project Name | <input checked="" type="checkbox"/> Enabled | |
| * API Name | ProjectName | | |
| Column Assignment | | | |
| * Data Type | Character | * Table Column | ATTRIBUTE1 |
| | | <input type="button" value="View Value Set"/> | <input type="button" value="Create Value Set"/> |
| Validation | | | |
| * Value Set | FUN_150_CHARACTERS | Range Type | |
| Value Set Description | 150 Characters free text with no validation. | <input type="checkbox"/> Required | |
| Initial Default | | | |
| Default Type | Constant | | |
| * Default Value | OracleApps88 | | |
| Display Properties | | | |
| * Prompt | Project Name | Definition Help Text | |
| * Display Type | Text Box | Instruction Help Text | |
| Display Size | | | |
| Display Height | | | |
| <input type="checkbox"/> Read-only | | | |
| Business Intelligence | | | |
| <input checked="" type="checkbox"/> BI Enabled | | BI Label | |

Click on Save and Close button

Edit Descriptive Flexfield: Invoices

| Name | Invoices | Segment Separator | | | | | | | | | | | |
|--|---|-------------------|--------------------|--------------|------|--------------|-----------|--------|----|--------------|------------|--------------------|--------------|
| Flexfield Code | AP_INVOICES | Application | Payables | | | | | | | | | | |
| Description | Fields for invoice details on the invoice page. | Module | Payables | | | | | | | | | | |
| Global Segments | | | | | | | | | | | | | |
| Actions ▾ View ▾ Format ▾ + ⌂ Detach ⌂ Wrap <table border="1"> <thead> <tr> <th>* Sequence</th> <th>Name</th> <th>Table Column</th> <th>Value Set</th> <th>Prompt</th> </tr> </thead> <tbody> <tr> <td>10</td> <td>Project Name</td> <td>ATTRIBUTE1</td> <td>FUN_150_CHARACTERS</td> <td>Project Name</td> </tr> </tbody> </table> | | | | * Sequence | Name | Table Column | Value Set | Prompt | 10 | Project Name | ATTRIBUTE1 | FUN_150_CHARACTERS | Project Name |
| * Sequence | Name | Table Column | Value Set | Prompt | | | | | | | | | |
| 10 | Project Name | ATTRIBUTE1 | FUN_150_CHARACTERS | Project Name | | | | | | | | | |

Click on the Deploy Flexfield button

Manage Payables Descriptive Flexfields

Search

| | |
|----------------|----------------------|
| Name | <input type="text"/> |
| Flexfield Code | AP_INVOICES |
| Module | <input type="text"/> |

Done

Search Results

| Name | Type | Module | Flexfield Code | Entity Usages | Description | Deployment Status |
|----------|-----------------------|----------|----------------|---------------|--------------------------------|-------------------|
| Invoices | Descriptive Flexfield | Payables | AP_INVOICES | | Fields for invoice details ... | |

Search Reset Deploy Flexfield

Click on Ok

Manage Payables Descriptive Flexfields

Search

| | |
|----------------|----------------------|
| Name | <input type="text"/> |
| Flexfield Code | AP_INVOICES |
| Module | <input type="text"/> |

Search Results

| Name | Type | Module | Flexfield Code | Entity Usages | Description | Deployment Status |
|----------|-----------------------|----------|----------------|---------------|--------------------------------|-------------------|
| Invoices | Descriptive Flexfield | Payables | AP_INVOICES | | Fields for invoice details ... | |

AP_INVOICES : Confirmation

Deployment completed successfully. Start a new session of the runtime application to view changes.

Entity Usages Processed: 3 of 3 .

Flexfield Metadata Validation: 0 Errors, 0 Warnings

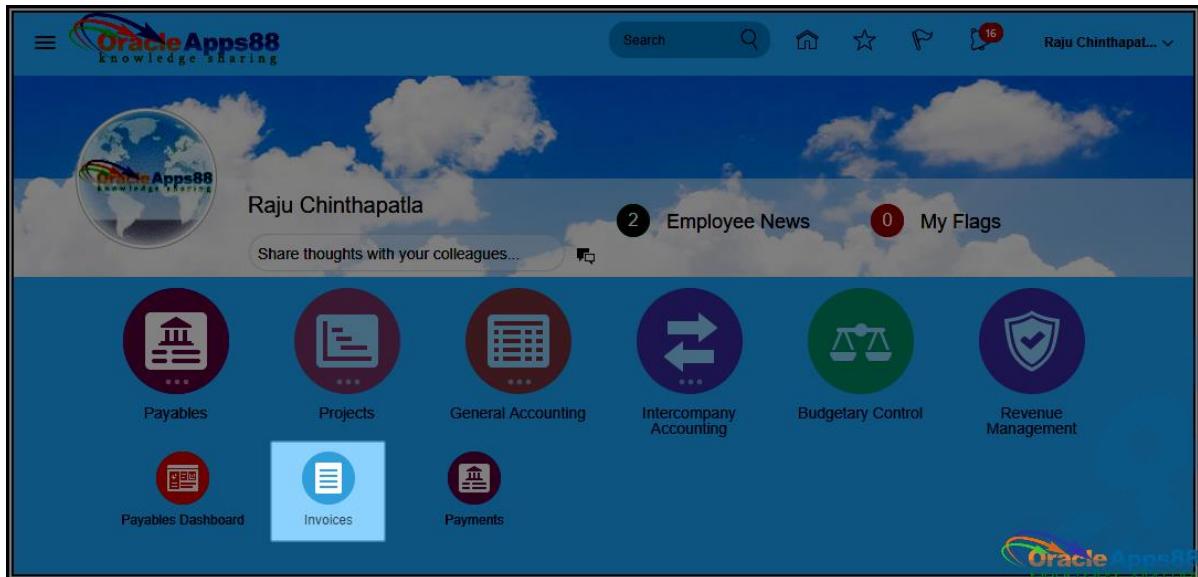
Flexfield Deployment Details

OK

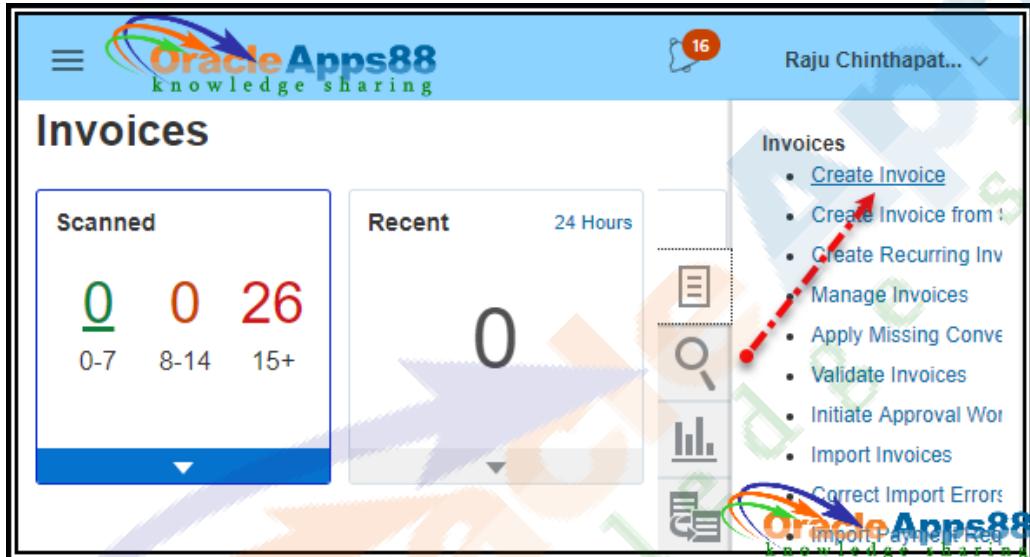
Verify the DFF in Invoice Page

Move to Invoice page

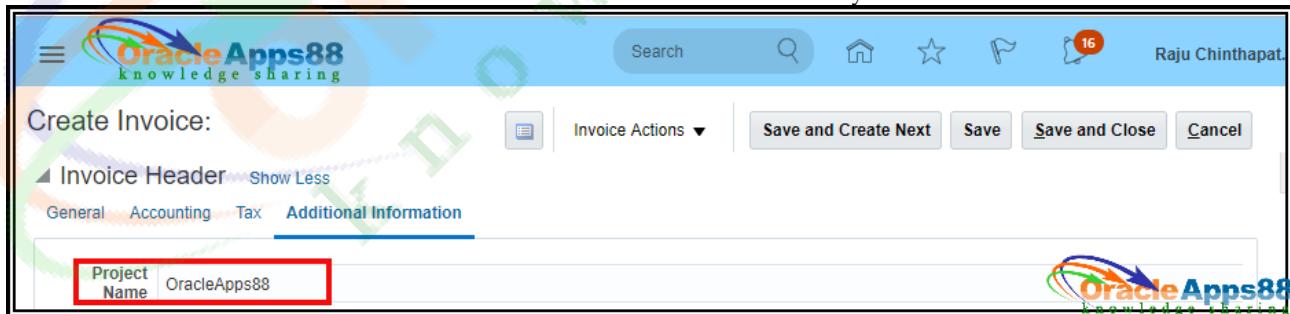
Nav : Payables → Invoices



Click on Create Invoice



Click on Show more in Header and moved to Additional Information and you can see the DFF field





Join the <https://t.me/OracleApps88> group or Connect with me at [@apps88](#) (<https://t.me/apps88>) or [\(+91\) 9059574321](tel:+919059574321) in **Telegram**, to get more information on Oracle EBS R12/Cloud (Fusion) applications.