Integrated Cloud Applications & Platform Services

Oracle HCM Cloud: Global Human Resources

Student Guide

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Course Overview

Lesson Agenda

This lesson provides an introduction to the following:

- Instructor and class participants
- Course:
  - Audience
  - Objectives
  - Methodology
  - Materials
  - Agenda

Course Objectives

After completing this course, you should be able to:

- Set up common Human Capital Management (HCM) components, including geographies, enterprise structures, and workforce structures.
- Test your setup by entering data and performing common Workforce Deployment processes
- Set up workforce records

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Human Capital Management: Overview

Objectives

After completing this lesson, you should be able to explain the Human Capital Management structure.

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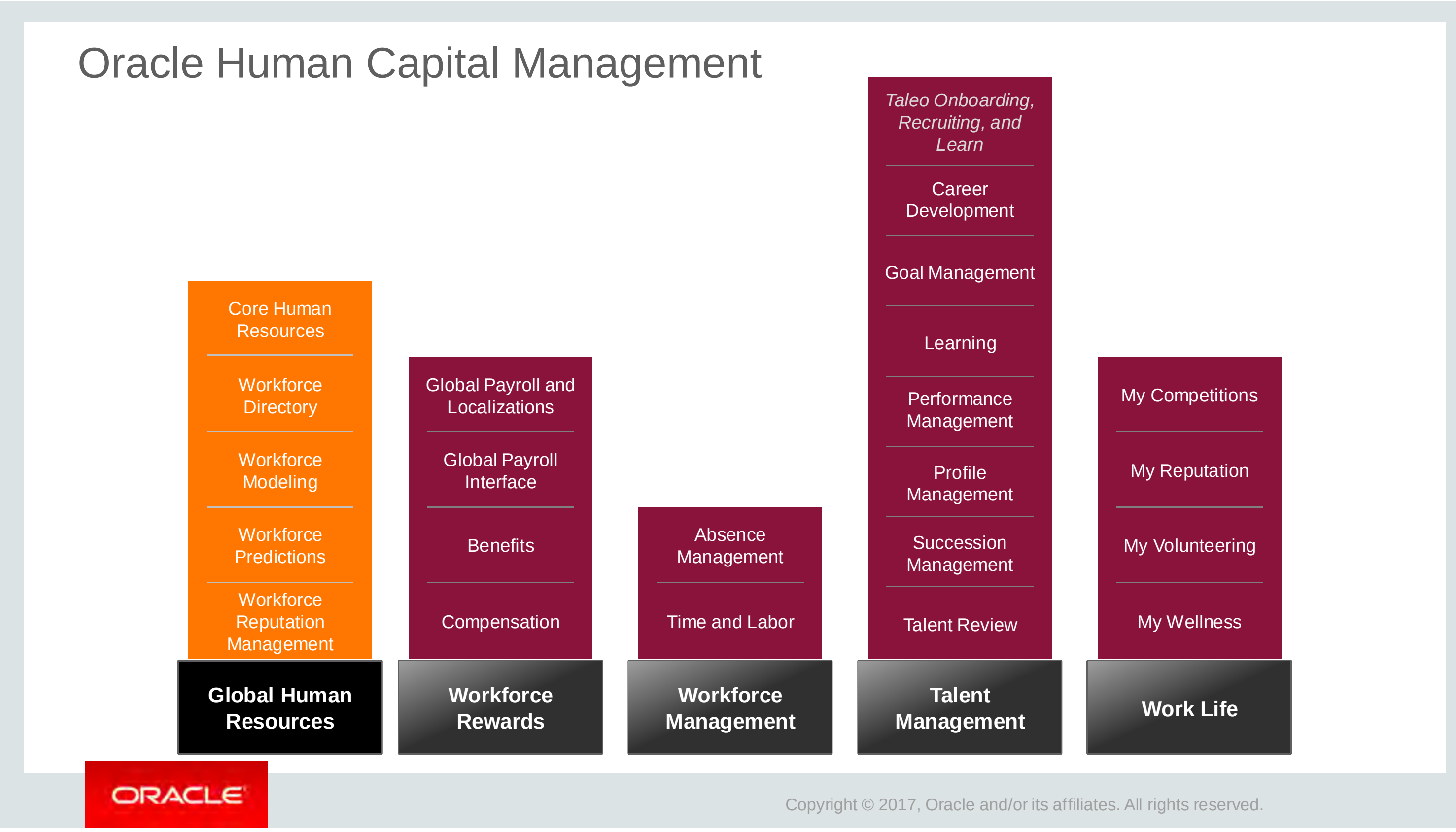


Oracle Fusion HCM covers the following five primary business processes of managing human capital.

Global Human Resources

Oracle Global Human Resources enables organizations to maximize worker value. By utilizing such features as Workforce Directory, Workforce Modeling, Workforce Predictions, and Workforce Reputation Management your organization can:

- Show a complete view of your organization and provide a place to connect with people.
- Plan, model, and deliver optimized, large-scale organizational changes faster and with greater certainty.
- Forecast performance to more accurately predict outcomes and lead to better decision-making.
- Analyze social influence within your workforce.

Workforce Rewards

The area of Workforce Rewards leverages such features as Global Payroll and Localizations, Global Payroll Interface, Benefits, and Compensation. These features enable your organization to:

- Streamline payroll administration to comply with local taxation and payroll rules locally and globally.
- Tailor your global benefits solution from simple to highly complex plans.
- Design and deliver tailor compensation programs for global and local organizations.

Workforce Management

The area of Workforce Management deals with features such as Absence Management and Time and Labor to enable your organization to:

- Implement absence and leave policies globally or locally.
- Track, monitor, and increase accuracy of time reporting.

Talent Management

In addition to utilizing Taleo Onboarding, Recruiting, and Learn features, the area of Talent Management is also comprised of such features as Career Development, Goal Management, Learning, Profile Management, Succession Management, and Talent Review. These features enable your organization to:

- Recruit, screen, and hire applicants efficiently and collaboratively.
- Plan for your future with high-impact employee development plans.
- Rapidly develop content using flexible editing tools or by importing content, all while following appropriate standards.
- Personalize learning content to address multiple audiences, and establish curriculum for mentoring programs, rotational assignments, or other training programs based on company needs.
- Capture formal and informal feedback from multiple sources to provide a rich, well-rounded portrait of your employees.
- Ensure your best talent is in line for future leadership and critical roles.
- Optimize the talent review process to efficiently identify and manage your top talent.

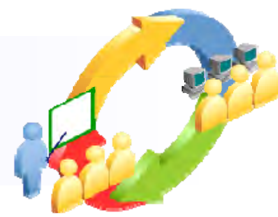
Work Life

The Work Life area focuses on features such as My Competitions, My Reputation, My Volunteering, and My Wellness. Together these features enable your organization to:

- Manage fun competitions that help drive business goals.
- Analyze social influence within your workforce.
- Engage in company volunteer projects.
- Promote a healthier work-life balance.

Global Human Resources

- Global Human Resources
- Workforce Directory
- Workforce Modeling
- Workforce Predictions
- Workforce Reputation Management



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Global Human Resources enables you to implement business processes that improve productivity and provide decision-making support. The best practices are built into the role-based self-service functionality as well as the administrative user's views.

- Both HR specialists and managers can monitor the hire process, with visual dashboards that prevent bottlenecks in the process. Hire status, start date, and approvals are provided in a central location that includes social collaboration tools to quickly resolve any questions.
- All worker transfers may be administered with an intuitive process that supports complex global redeployments (across legal employers and legislative groups) and simple transfers of department and manager.
- Automated security role provisioning is provided within business processes (for example, . Hire, Promotion, Transfer) to grant secured access based on the worker's role in the organization.
- Integration with benefits for processing life events
- Integration with global payroll for payroll processing, including multiple jobs
- Integration with talent management applications for effective pay for performance and organizational growth.

Oracle HR and Payroll Country Extensions

International Coverage	Country Extensions	
Over 200 Countries 	Australia	India
	Canada	Netherlands
	China	Singapore
	France	United Kingdom
	Germany	United States

Note: This is not a comprehensive list of countries we support for Oracle Human Capital Management Cloud: Global Human Resources. Please refer the recommended White paper (in the Notes section) for a complete listing of all supported countries.

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Payroll is currently supported for the US, Canada, the UK, the UAE, Saudi Arabia, Kuwait and China.

See the following white paper for details on:

- How Localizations are supported at different tiers
- What each tier supports as well as the countries supported at each tier
- What countries languages are supported

Link to White Paper (ID 2152642.1):

https://support.oracle.com/epmos/faces/DocumentDisplay?_afrLoop=191179527580077&id=2152642.1&_adf.ctrl-state=96r0izdav_140

Oracle HR and Payroll Language Support

- Arabic
- Chinese (Simplified)
- Chinese (Traditional)
- Czech
- Danish
- Dutch
- English
- Finnish
- French (European)
- French (Canadian)
- German
- Hebrew
- Hungarian
- Italian
- Japanese
- Korean
- Norwegian
- Polish
- Portuguese (Brazilian)
- Russian
- Spanish
- Swedish
- Turkish

Demonstration

- 2-1: Exploring HCM Applications Help

Using the activity guide, your instructor performs the specified demonstration.

Quiz

Global Human Resources enables you to do the following:

a. Show a complete view of your organization and provide a place to connect with people.
b. Plan, model, and deliver optimized, large-scale organizational changes faster and with greater certainty.
c. Forecast performance to more accurately predict outcomes and lead to better decision-making.
d. Analyze social influence within your workforce.
e. All of the above

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Answer: e

All of the above

Summary

In this lesson, you should have learned how to explain the Human Capital Management structure.

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Introduction to the User Interface

Lesson Objectives

After completing this lesson, you should be able to:

- Explain user interface elements
- Perform basic navigation

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Oracle Fusion Applications User Interface (UI)

- Operates on many hand-held devices and facilitates easy access to common tasks
- Focuses on commonly used employee self-service tasks and line manager tasks

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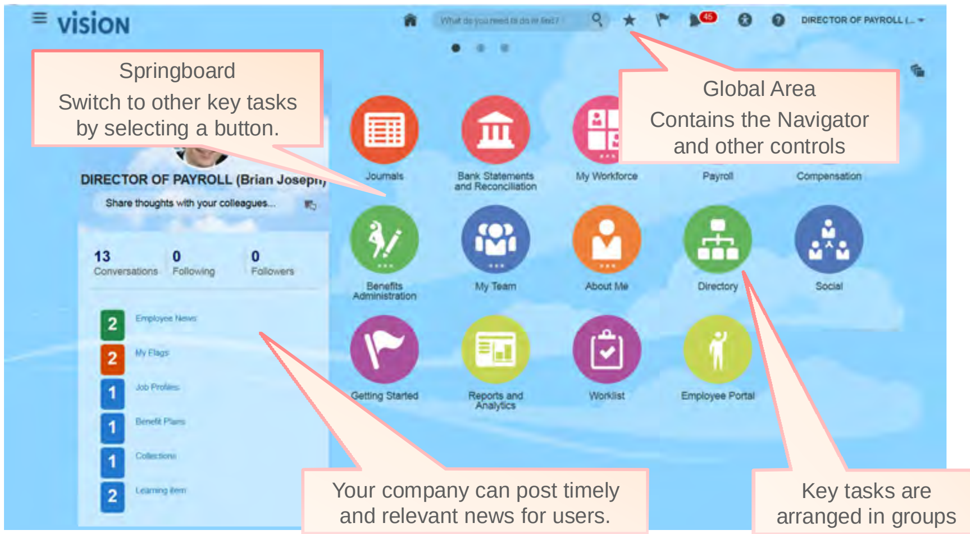
Home Page

Intuitive interface with buttons for commonly-used objects:



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Springboard

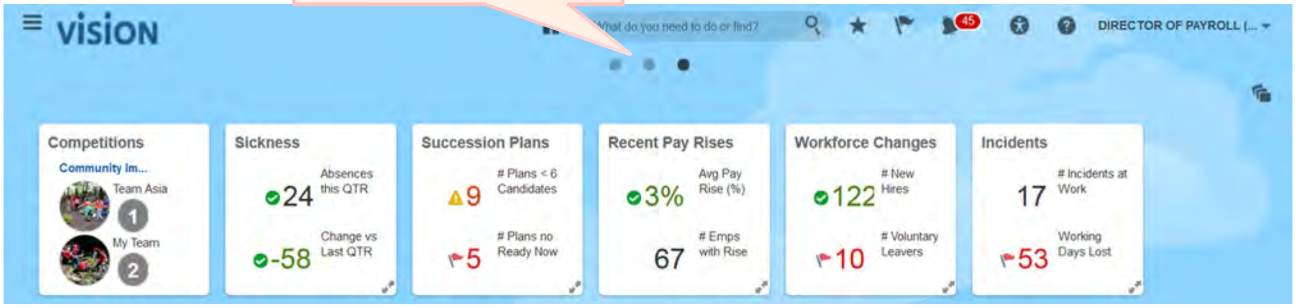
Use buttons in the springboard to open pages (work areas and dashboards).

A user’s roles and other setup determine what’s available in the springboard for that user.

Infolet Page

- Infolets are small interactive widgets on the home page that provide key information and actions for a specific area, for example social networking or your personal profile. Each infolet can have multiple views.
- Users can have multiple infolet pages.

Use the row of dots to navigate between the springboard and your infolet pages



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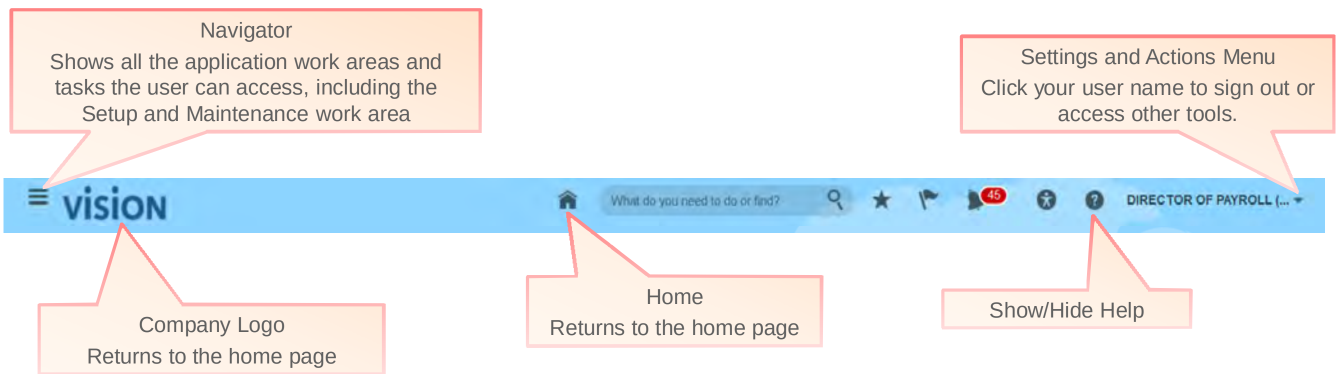
Global Area

The global area persists across the top of every page in the user interface.



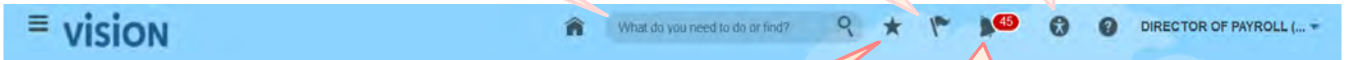
The five controls in the global area that are highlighted here are the ones you use most often in this course.

Other Global Area Features

Global Search
Search for a specific business object

Watchlist Provides shortcuts to items that you want to track or that require your attention

Accessibility
Lists options for accessibility preferences

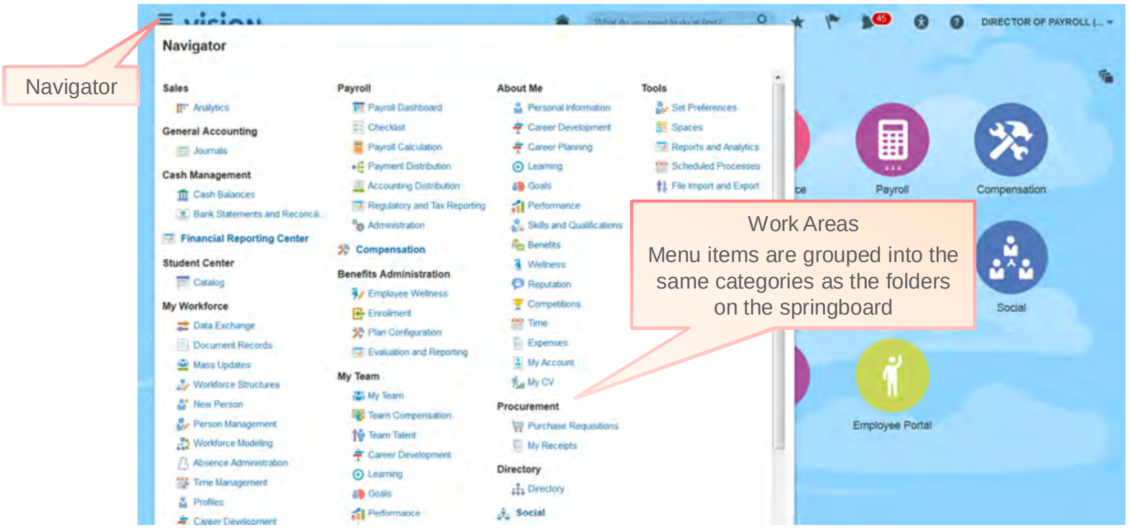


Favorites and Recent Items
Lists bookmarked pages and pages you recently visited

Notifications Lists workflow-generated notifications such as requests for approval

Navigator Menu

Use the Navigator menu to access work areas.



A user’s roles and other setup determine what’s available in the Navigator menu for that user.

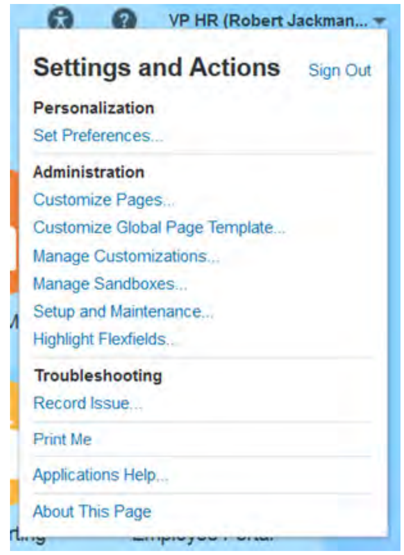
Settings and Actions

The Settings and Actions menu:

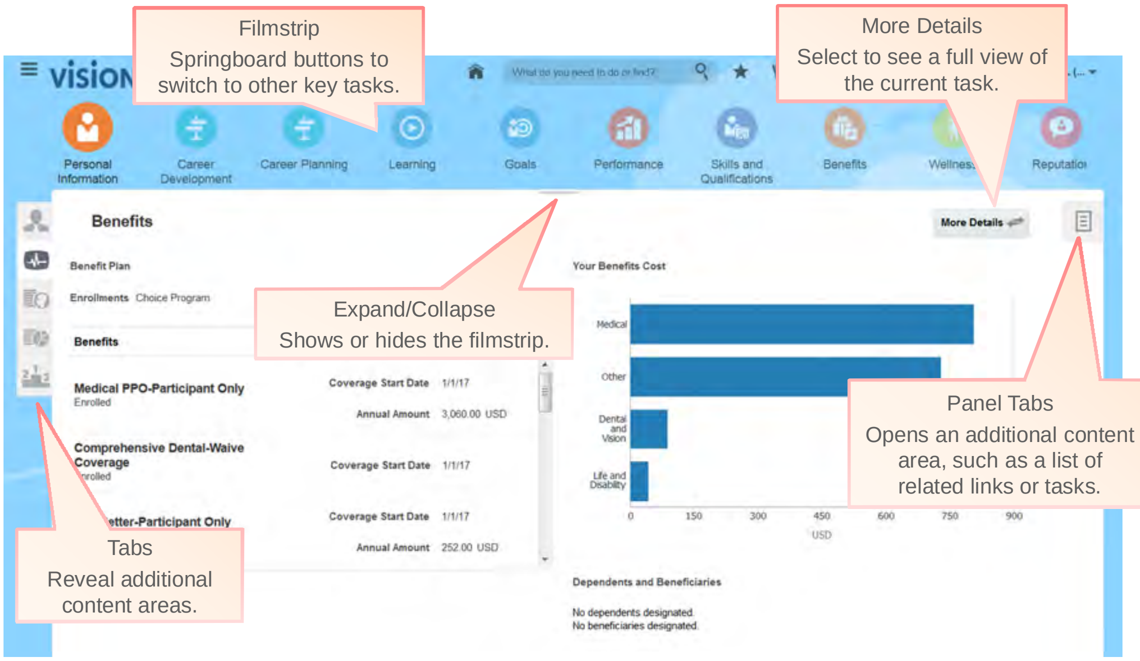
- Is opened by clicking your user name in the global area.
- Provides tools for working with or setting up the application.

For example, you can:

- Set your own preferences
- Personalize or customize the page you're on (where available)
- Access other customization tools
- Open the Setup and Maintenance work area
- Sign out



Additional Interface Elements



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The More Details button usually takes you to a related work area to perform detailed tasks.

Summary

In this lesson, you should have learned to:

- Explain user interface elements
- Perform basic navigation

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4

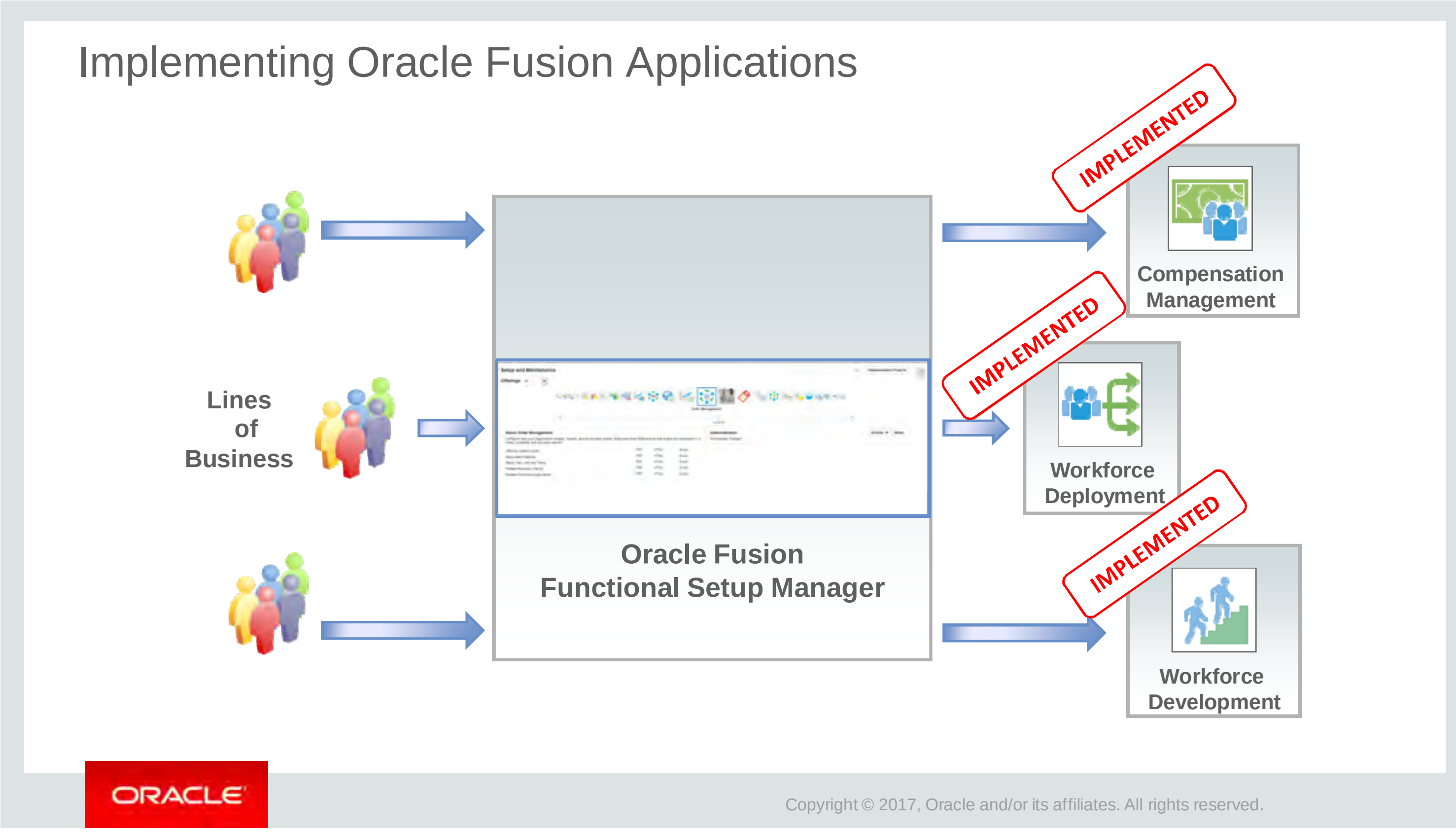
Functional Setup Manager: Enabling Offerings for Initial Use

Objectives

After completing this lesson, you should be able to do the following:

- Describe the applications implementation process
- Explain the different implementation roles
- Navigate to Oracle Fusion Functional Setup Manager
- Identify the Functional Setup Methodology
- Enable offerings, functional areas, and features for initial use
- Create an implementation project and assign implementation project tasks

This lesson introduces you to Oracle Fusion Functional Setup Manager.



Functional Setup Manager (FSM) is an application in Oracle Fusion Applications suite, which is used to implement all Oracle Fusion Applications offerings. FSM provides an efficient and consistent implementation process for the entire applications implementation life cycle. The life cycle includes the planning, configuration, implementation, deployment, and ongoing maintenance steps of the functional setup of the applications. Using FSM, you can:

- Understand implementation requirements and plan accordingly.
- Configure applications to match your business needs.
- Get complete visibility to set up requirements through guided, sequential task lists.
- Enter setup data through easy-to-use user interfaces available directly from the task lists.
- Export and import to rapid-start functional setup at different instances.
- Validate setup by reviewing setup data reports.

Key Benefits

FSM key benefits provide:

- Self-service administration
- Complete transparency
- Configurable and extensible features
- Reusable templates for rapid start and consistency across applications
- Comprehensive reporting

- **Self-service administration:** An integrated, guided process for planning, configuration, implementation, deployment, and maintenance enables management of all aspects of functional setup of Oracle Fusion applications at the business user level.
- **Complete transparency:** Auto-generated, sequential task lists include prerequisites and address dependencies to give full visibility to end-to-end setup requirements of Oracle Fusion applications.
- **Configurable and extensible:** Prepackaged list of tasks for setting up Oracle Fusion applications can be easily configured and extended to better fit with the business requirements.
- **Reusable for rapid start:** Specific implementations can be templatized to facilitate reuse and rapid start of consistent Oracle Fusion applications setup across many instances.
- **Comprehensive reporting:** A set of built-in reports help to analyze, validate, and audit configurations, implementations and setup data of Oracle Fusion applications.

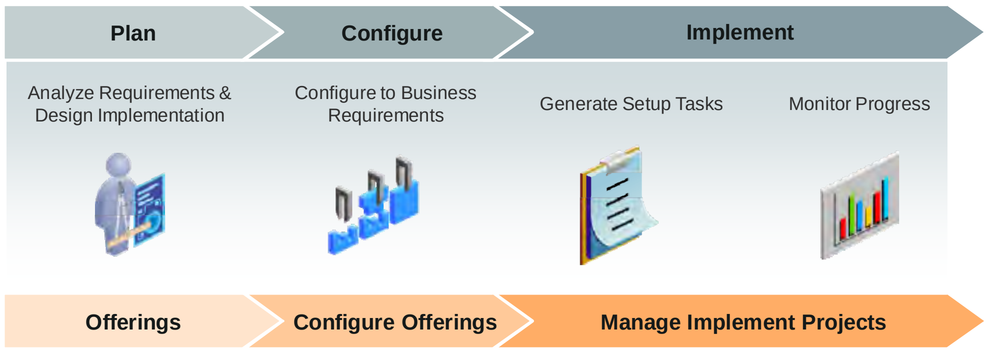
Job Roles with Functional Setups User Permissions

The delivered job roles that inherit permissions from the Functional Setups User abstract role are:

- Application Implementation Consultant
- Human Capital Management Application Administrator
- IT Security Manager
- Other functional users, such as line managers

Application Implementation Manager

Users with this job role typically are responsible for managing the overall implementation of the Oracle Fusion applications.

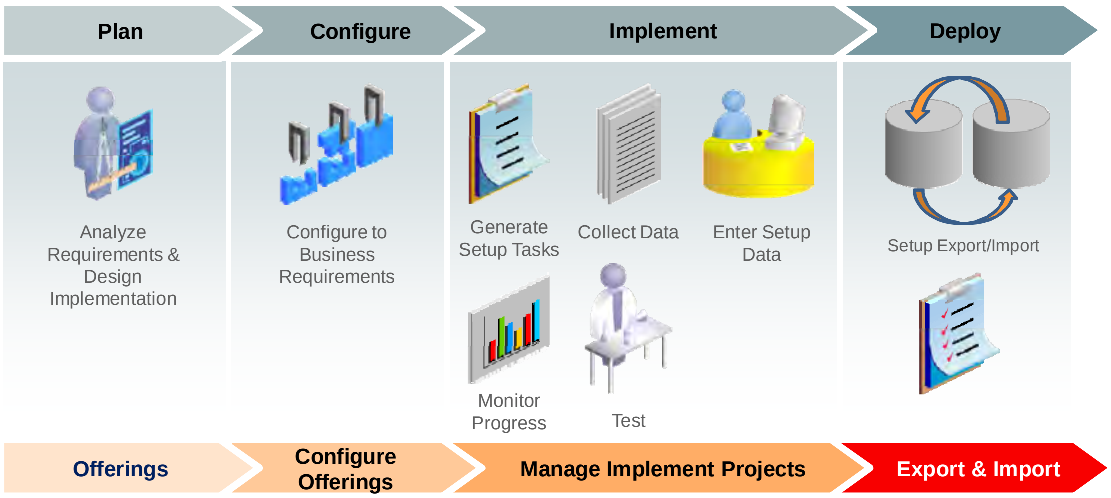


Application implementation managers have access to:

- Setup and Maintenance
- Configure Offerings
- Manage Implementation Projects
- Manage Configuration Packages

Application Implementation Consultant

This is a super user job role for Functional Setup Manager with access to all setup functionality.



Users with this role can fulfill all aspects of the implementation life cycle.

- Setup and Maintenance
- Configure Offerings
- Manage Implementation Projects
- Assigned Implementation Tasks
- Manage Configuration Packages
- Export and Import
- All Tasks

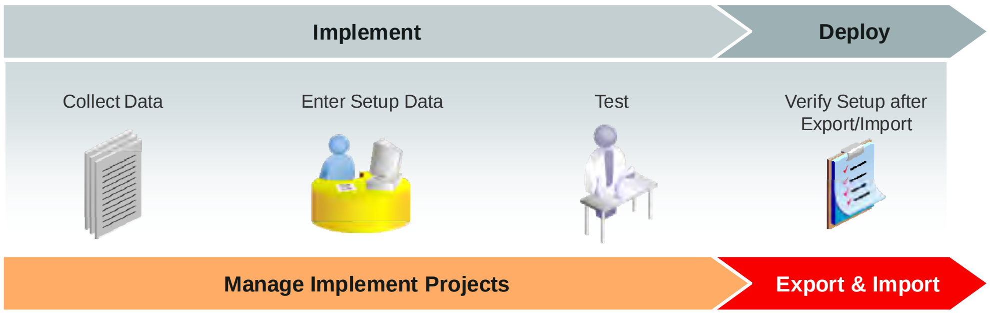
This role is usually granted sparingly to a limited number of individuals, and is mostly used during smaller projects such as conference room pilots.

Human Capital Management (HCM) Application Administrator

- Users with this job role have access to all HCM setup tasks.
- This job role is typically used when you implement Oracle Fusion Human Capital Management applications.
  - Example: Users with this job role set up common objects owned by HCM, such as departments and jobs.

Functional Users

- Subject matter experts from the lines of business
- Responsible for managing the setup data of their specific functional areas



Functional users have job roles that include Functional Setups Duty or the equivalent product-specific setups duty.

You can assign Functional Setups Duty to other job roles according to your business requirements.

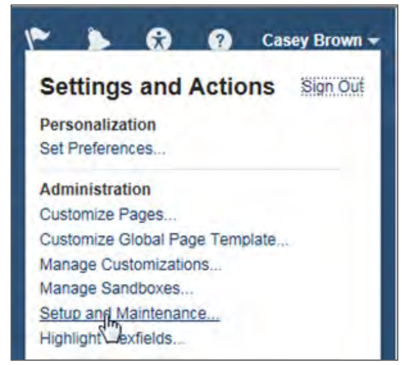
Functional users have access to:

- Assigned Implementation Tasks
- Setup and Maintenance
- Getting Started
- Tasks and Task Lists

Navigating to Functional Setup Manager

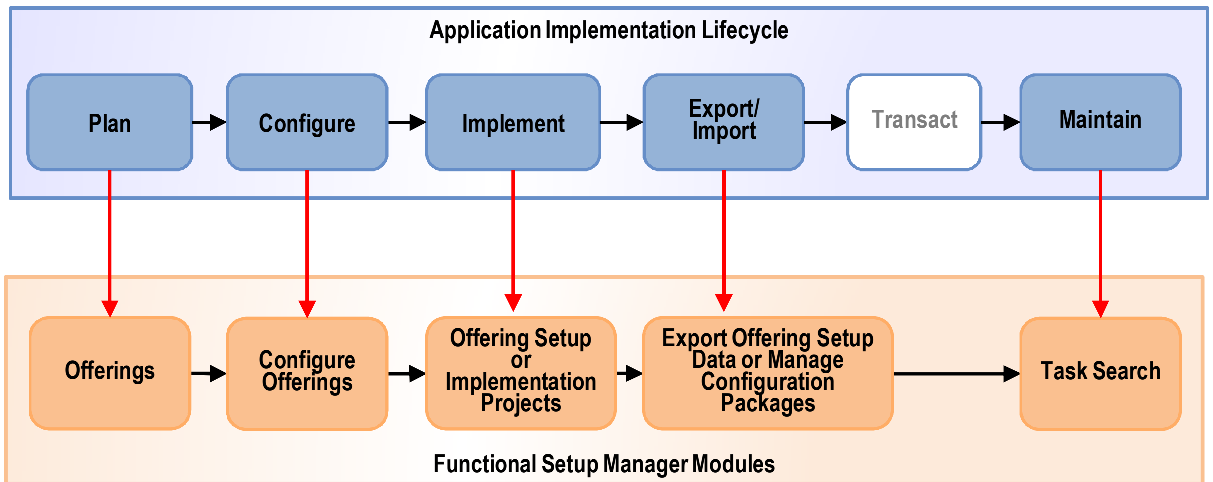
The Oracle Fusion applications work area for Functional Setup Manager is called Setup and Maintenance. Users with any of the Functional Setup–related enterprise roles use one of the following two paths to navigate to Setup and Maintenance work area:

1. Settings and Actions > Administration > Setup and Maintenance
    a. The Settings and Actions menu is accessed by clicking the user name.
2. Navigator > Setup and Maintenance



Functional Setup Methodology

Guided Process for Application Implementation Life Cycle

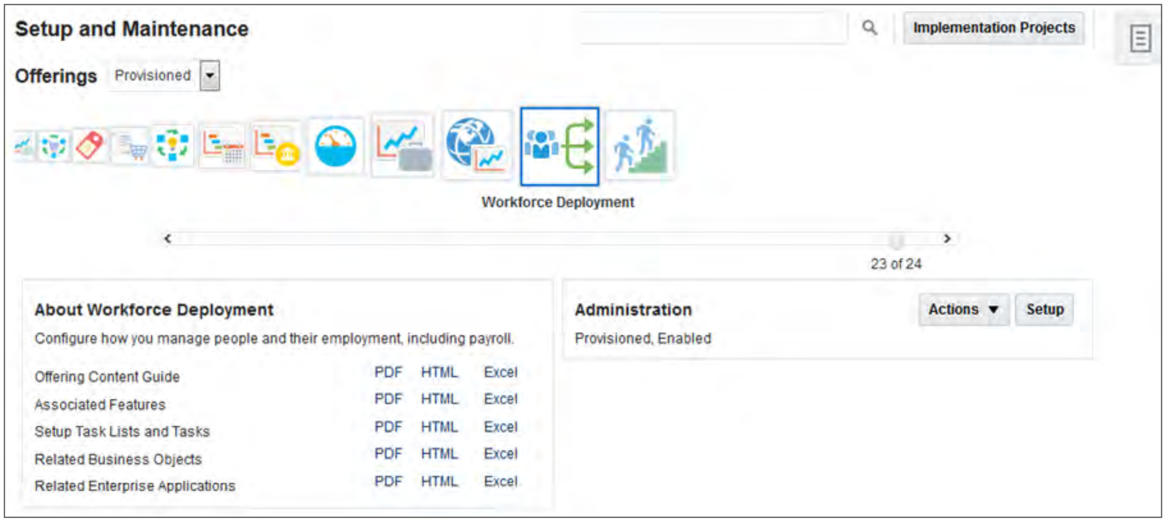


Whether you are implementing Oracle Fusion applications for the first time or making incremental change to an existing implementation, Functional Setup Manager provides an end-to-end guided process for managing your functional setups throughout the entire implementation life cycle.

Every phase of application implementation life cycle is supported by Functional Setup Manager. Each step builds upon the decisions you make in the previous steps to provide a fully integrated applications implementation process. You::

- Analyze implementation requirements, design setup, and plan overall implementation using Offerings.
- Configure applications to match your business requirements using Configure Offerings.
- Following a predefined list of tasks required for the features you selected to implement using Offering Setup or Generate setup tasks using Manage Implementation Projects.
- Export and import setups from one Oracle Fusion Applications instance to another using Export Offering Setup or Manage Configuration Packages.
- Maintain setup over time by searching and performing tasks from Search.

Working with the Offerings Page



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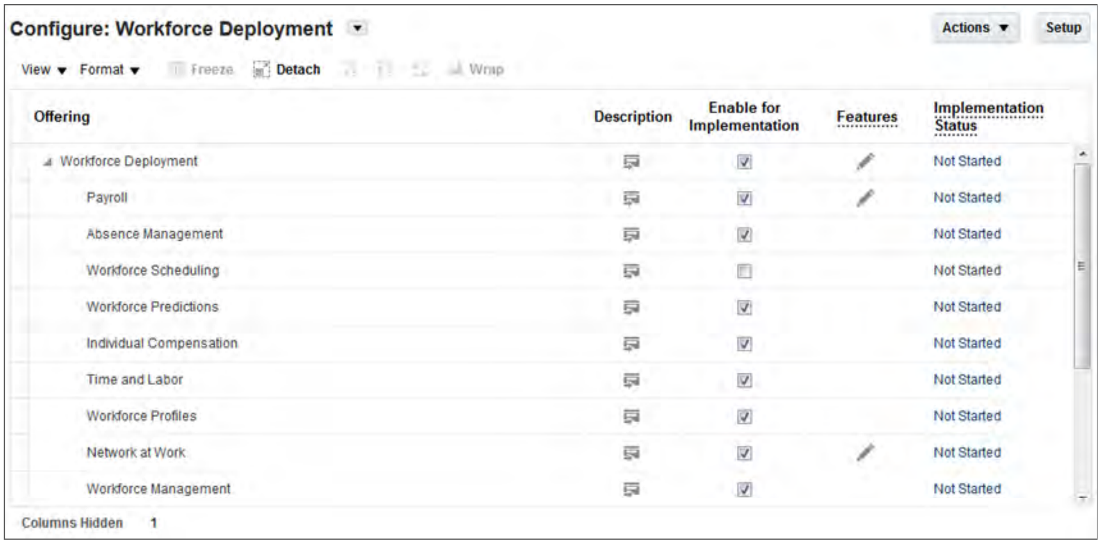
Implementers should start planning Oracle Fusion Applications implementation from the Offerings page in the Setup and Maintenance work area.

Before starting to implement, the implementers need to understand what functionality is offered by Oracle Fusion Applications, compare them with the business requirements, and then plan for implementation accordingly.

Offerings, which is a self-service portal, shows all Oracle Fusion Offerings in a single interface allowing implementers to easily get an overview of the applications.

- A standard set of reports for each Offering, which shows detailed information on various implementation requirements, is also provided.
- The reports help implementers to plan for decisions that need to make in the later phases of the implementation.

Working with Configure Offerings



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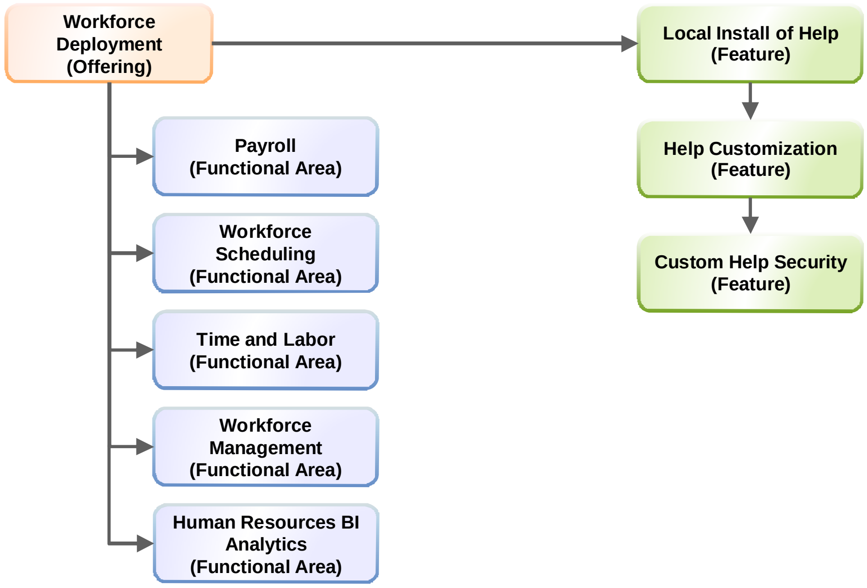
After finishing analysis of the Offerings, implementers should use Configure Offerings to select the Offerings, Functional Areas, and Features that are applicable to their business.

Why Configure Offerings?

- How you configure the Offerings determines how Oracle Fusion application setups and transactional processes work in your implementation. For setup, when Functional Setup Manager generates a list of setup tasks during the implementation phase, only those tasks needed to implement the selected Offerings, Functional Areas, and Features are included in the task list. Therefore, you get a targeted task list necessary to meet your implementation requirements while irrelevant tasks are excluded.
- For transactional processes, application functionality and controls such as, form region, table columns, buttons, or links, could be displayed or be hidden according to your Offering configuration.
- Although offering configuration can be changed any time, the changes are not influence on any of the existing implementation task lists. However, results of the changed configuration are reflected in any new implementation task list generated after making the change.

Progressive Decision Making with Offering Hierarchy



Offering, Functional Areas, and Features are organized in multilevel hierarchy to help implementers in making decisions progressively during configuration of Offerings. If an implementer decides that certain module or application functionality is not applicable to his or her implementation, then making decision on other modules or application functionality that depends on the first one becomes irrelevant. Functional Setup Manager, therefore, presents the Functional Areas and Features in the context of their parent – child relationship.

Enabling Offering and Functional Areas for Implementation

- An Offering or its Functional Areas can either be selected or not selected for implementation. You select or deselect the Enable For Implementation check box to specify your selection.
- The Provisioned column in Configure Offerings shows whether or not an Offering is provisioned.
  - Although Functional Setup Manager does not prevent users from enabling Offerings that have not been provisioned, ultimately users are not able to perform the tasks needed to enter setup data for those Offerings.
  - When a user starts configuring a nonprovisioned Offering, Functional Setup Manager shows a warning message explaining the consequence.

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Selecting Feature Choices

- If the selected Offerings and Functional Areas have dependent features, those features are applicable when the corresponding Offering and Functional Area is implemented.
- In general, the features are set with default configuration based on their typical usage. Implementers should always:
  - Review the available feature choices for their selected Offerings and Functional Areas.
  - Configure the features as appropriate for their implementation.

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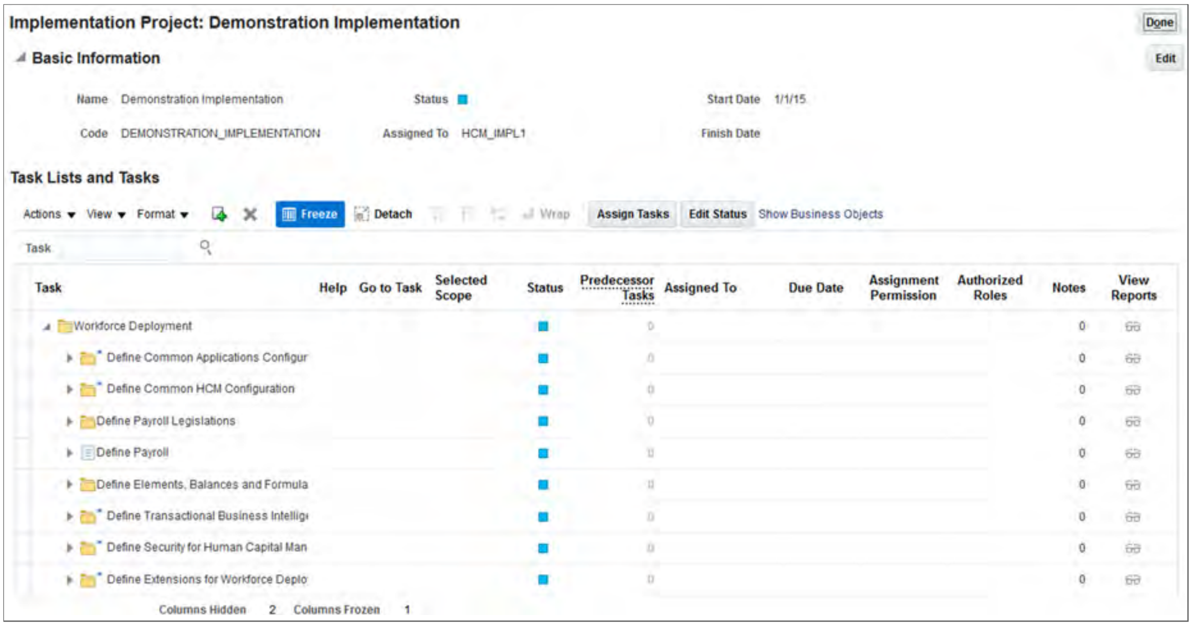
A Feature provides one of the following three types of selection choices:

- **Yes/No:** If a Feature can either apply or not apply to an implementation, a single check box is presented for selection. Users select or deselect to specify yes (if it applies) or no (if it does not apply), respectively. For example, when implementing Sales offering, companies or enterprises can either decide to use Local Installation of Help or not.
- **Single Select:** If a Feature has multiple choices but only one can be applicable to an implementation, selection choices are presented as radio buttons. Users are able to turn on only one of the choices. For example, when implementing Financials offering a company or an enterprise can choose to implement Subledger Accounting Method or Subledger Applications Method, but not both.
- **Multi-Select:** If the Feature has multiple choices but one or more can be applicable to an implementation, then feature choices are presented as check boxes. Users select all that applies by selecting the appropriate choices. For example, in Incentive Compensation (Offering), companies or enterprises can choose to implement reporting hierarchy as Supervisor Hierarchy, Resource Management Hierarchy, or both.

Implementation Projects



An implementation project is the list of setup tasks that are required for implementation of specific offerings and related functional areas.

The Implementation Project page includes the following table columns.

Go to Task

Opens a task page that is assigned to you.

Status

Displays the current status of the task. The status of a task or task list can be:

- Not Started
- In Progress
- Completed
- Execution Frozen
- Completed with errors

Predecessor Tasks

If any task list or task requires that another task be completed first, the other task is listed as a predecessor task. The name of the predecessor task is displayed when the mouse is over the number in that column. If there are multiple predecessor tasks, all are listed.

Assigned To

Displays the user or role to which the task is assigned.

Notes

If there are notes associated to the task, a number is displayed. Clicking the number displays the note window.

View Reports

Click the icon to see any of the reports available for the task list.

Instructor Demonstrations

- 4-1: Enable Offerings
- 4-2: Creating an Implementation Project and Assigning Implementation Tasks

Practice

- 4-1: Creating an Implementation Project and Assigning Implementation Tasks

Summary

In this lesson, you should have learned how to:

- Describe the applications implementation process
- Explain the different implementation roles
- Navigate to Oracle Fusion Functional Setup Manager
- Identify the Functional Setup Methodology
- Enable offerings, functional areas, and features for initial use
- Create an implementation project and assign implementation project tasks

6

Setting up Enterprise Structures

Objectives

After completing this lesson, you should be able to:

- Establish the enterprise structure using the ESC
- Understand the purpose of Enterprise and Work Structure tasks
- Set up configuration of individual and multiple enterprise structures
- Create and manage legal entities
- Manage business units, reference data sets, and common sets
- Establish job and position structures

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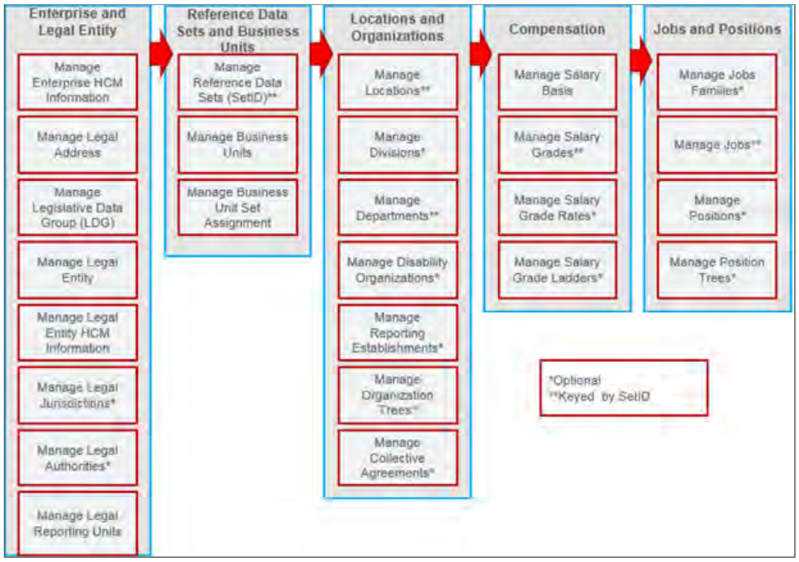
Enterprise and Work Structure Task Setup Sequence



Setting up the Enterprise and Work Structure Task Setup Sequence

When you complete the tasks or table setup in your Oracle Human Capital Management (HCM) Cloud system, you must load the tables in a prescribed sequence. The sequence must take into account the data dependencies of the system.

Note: This diagram consists of the Oracle HCM recommended order of tables. You can create your preferred order of tables and values as some tasks are independent of each other. The ESC can be utilized to populate the enterprise. Legal Entities, Divisions, Business Units, Business Unit Set Assignment can be configured during the initial implementation.

We will access each task separately and discuss them in detail in the forthcoming lessons.

ESC Overview

- The ESC is an interview-based tool that guides you through the configuration of your enterprise structures.
- Use the ESC as part of your setup to define the organization structures and job and position structures of the enterprise.
- Access the ESC using the Establish Enterprise Structures task.

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To access the ESC, select the **Establish Enterprise Structures** task under the **Define Initial Configuration** task list, in the **Setup and Maintenance** work area.

Enterprise Structures Configurator

The Enterprise Structures Configurator (ESC), also known as the HCM Configuration Workbench, is an interview-based tool that guides you through the configuration of your enterprise structures. Use the ESC as part of your setup to define the organization structures and job and position structures of the enterprise.

Establishing Enterprise Structures Using ESC

You use the guided flow within the Establish Enterprise Structures task to enter basic information about your enterprise, such as the primary industry and the location of your headquarters. You then create divisions, legal entities, business units, and reference data sets.

Establishing Job and Position Structures Using ESC

You use a guided process to determine if you need positions as well as jobs in your enterprise and set up additional attributes and contextual attributes for jobs and positions. The ESC uses the primary industry you selected in the Establish Enterprise Structures task to suggest a recommended approach for using jobs, or jobs and positions. You can use the recommendation or answer a series of questions about how you manage people.

ESC Benefits

Using the ESC, you can:

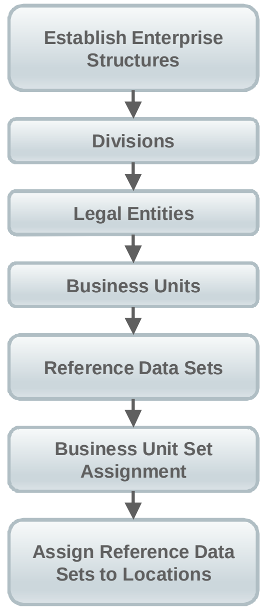
- Create all the organizational structures at one time
- Create multiple configurations to test multiple scenarios
- Review the enterprise configuration prior to loading it
- Roll back an enterprise configuration after loading it

Using the ESC

Establishing enterprise structures using the ESC includes:

- Describing the organization components within an enterprise
- Setting up multiple enterprise configurations
- Reviewing enterprise configurations
- Loading one enterprise configuration

Establish Enterprise Structures



The graphic displays all the components you set up in the ESC and the order in which you perform the tasks.

Manage Enterprise

The Establish Enterprise Structures task guides you through the high-level organizational setup, using the ESC guided flow.

Enterprise Structure Components

This graphic is an example of an enterprise structure with two divisions operating in four countries, with a combination of sales and marketing departments.

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- **Enterprise:** For each configuration in ESC, you define the high-level structures within the scope of an enterprise. It consists of legal entities under common control and management.
- **Division:** A division refers to a business or product-oriented subdivision. Divisions are used in HCM to define the management organization hierarchy, using the generic organization hierarchy. This hierarchy can be used to create organization-based security profiles.
- **Legal Entity:** A legal entity represents the legal employer and/or payroll statutory unit (PSU). A legal employer is a legal entity that employs people. A PSU is a legal entity responsible for the payment of its workers and can be used to report tax and social insurance.
- **Legislative Data Group (LDG):** (not shown in the graphic) LDGs are created automatically in ESC, with one LDG created for each location country identified in the interview. You can see them in the technical summary report. Use LDGs to partition payroll data in large organizations with multiple legal entities.
- **Departments:** A department is an organization to which you assign workers.

Note: The ESC does not create departments. You create departments using the Manage Departments task.

Enterprise and Divisions

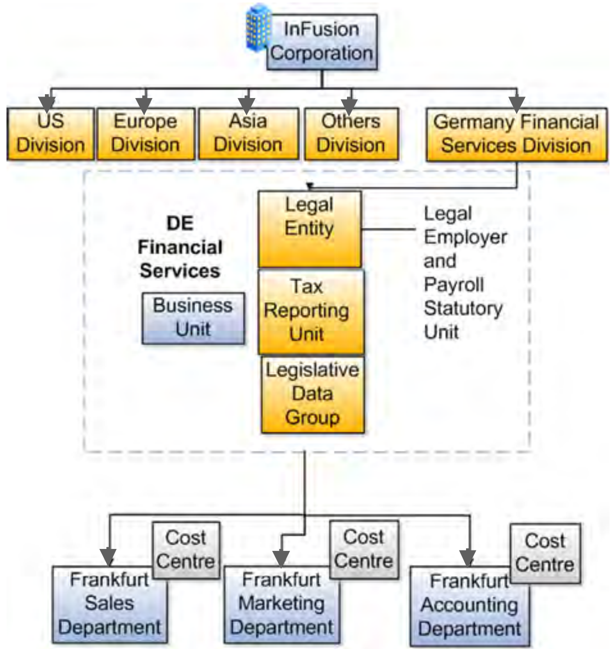
Enterprise

- Use the guided flow within the Establish Enterprise Structures task to enter basic information about your enterprise, and then create divisions, legal entities, business units, and reference data sets.
- When implementing Oracle Fusion Applications, you operate within the context of an enterprise that has already been created in the application for you.

Divisions

- A division refers to a business-oriented subdivision within an enterprise.
- A division can operate in one or more countries, and can be comprised of many companies or parts of different companies that are represented by business units.

Enterprise and Divisions



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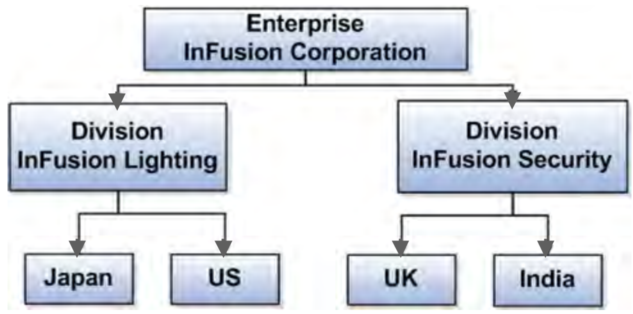
The figure illustrates the structure of the InFusion Corporation after adding a new division and other relevant organizations. The new division exists within the current enterprise structure, but you can manage the costs and reporting separately from the InFusion Corporation.

Legal Entities

ESC provides three options to create legal entities:

- Create legal entities automatically
- Upload legal entities from a spreadsheet using an HCM loader
- Create legal entities manually



You can:

- **Create legal entities automatically** based on the countries in which divisions of your business operate
- **Upload legal entities** from a spreadsheet if you have a list of legal entities already defined for your enterprise
- **Create legal entities manually** by adding individual legal entities

The graphic illustrates the InFusion Corporation with two divisions. The InFusion Lighting division operates in the US and Japan, and the InFusion Security division operates in the UK and India. Using the Map Divisions by Country page in the ESC, you can create a legal entity for each country. Therefore, the ESC creates four legal entities for the InFusion Corporation:

- InFusion Lighting Japan LE
- InFusion Lighting US LE
- InFusion Security UK LE
- InFusion Security India LE

Business Units

- Use for management reporting, processing of transactions, and security of transactional data
- Create manually or automatically
- Implement data security and assign data roles to users to give them access to data in business units and permit them to perform specific functions on this data.

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In the scenario represented in the diagram, InFusion decides to create business units using the country and business function level. Therefore, they create the following business units:

- Sales_Japan
- Marketing_Japan
- Sales_US
- Sales_UK
- Marketing_India
- Sales_India

Business Units: Considerations

- Do you use or ever plan to use Oracle Fusion Financials? If yes, then select the legal entity level to ensure financial transactions are processed correctly.
- Do you need business units at the functional level to represent, for example, Sales, Consulting, or Product Development?
- Do you need business units at the country level to represent the countries in which you operate?

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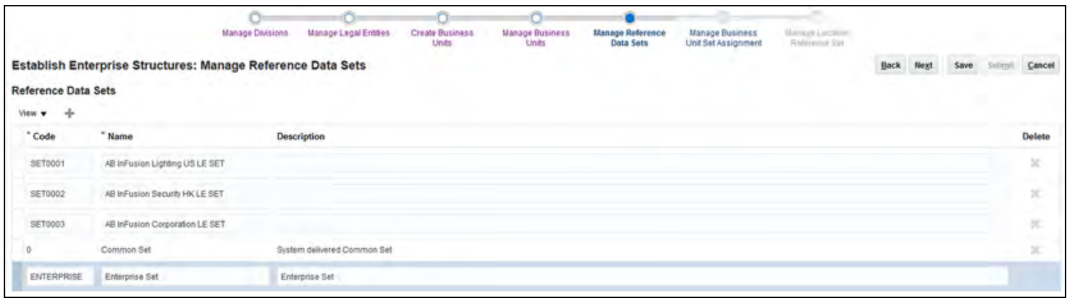
Reference Data Sets

- The ESC uses the business unit information to create the required reference data sets.
- The reference data set provides the business unit with information that is used at the transaction level.
- The business unit you associate to the person to determine certain set-enabled information, such as grades, departments, jobs, and locations that are available for the person.



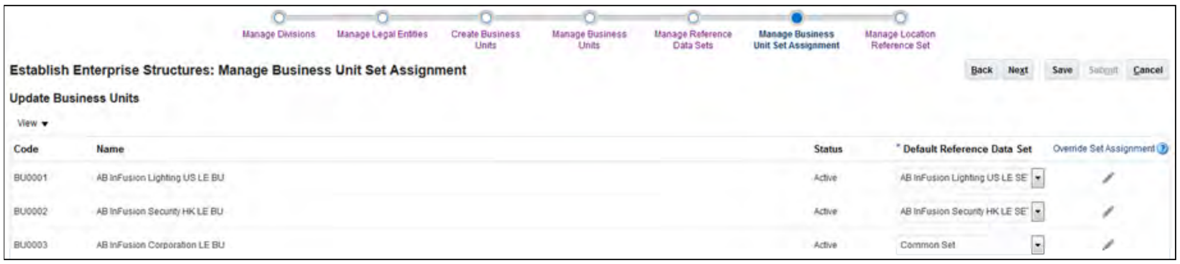
Example

If you create the business units at the division level, then the ESC creates one reference data set for each division. If you create business units automatically, then the ESC automatically creates reference data sets as well.

Business Unit Set Assignment

You can:

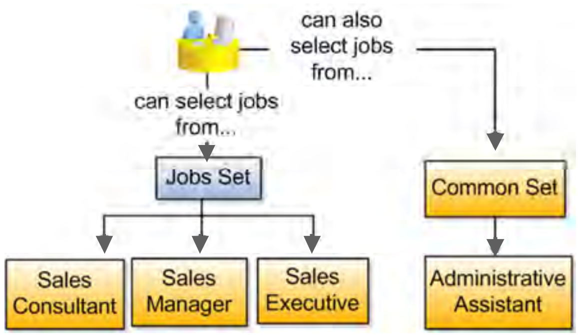
- Change the default reference data set, which is assigned to a business unit for all reference data groups
- Override the default reference data set for any reference data group. For example, in the below screenshot, Fusion Security SET is the default reference data set for the India Fusion Security business unit.



- You can change the default reference data set, which is assigned to a business unit for all reference data groups, such as grades, locations, departments, and jobs.
- You can override the default reference data set for any reference data group.
- You can override the set assignment so that grades are assigned to the default Fusion Security SET, departments are assigned to another set, and jobs are assigned to yet another set.

Common Set

The **Common Set** is a predefined set that enables you to share reference data across business units.



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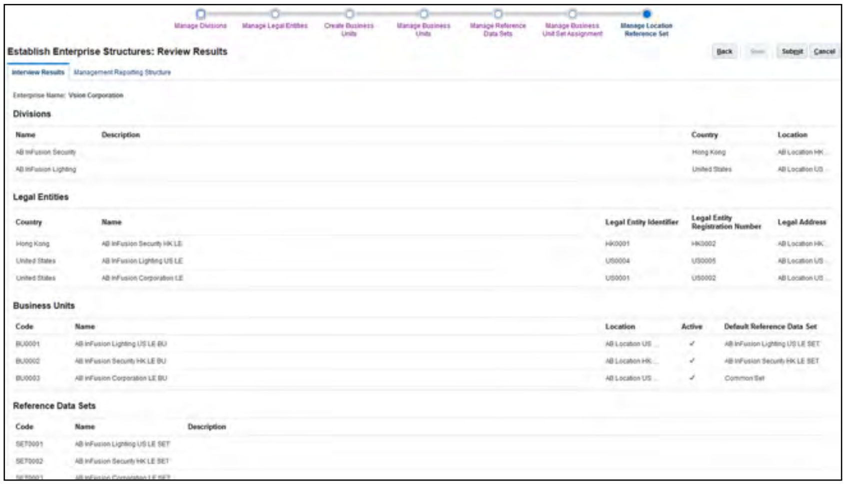
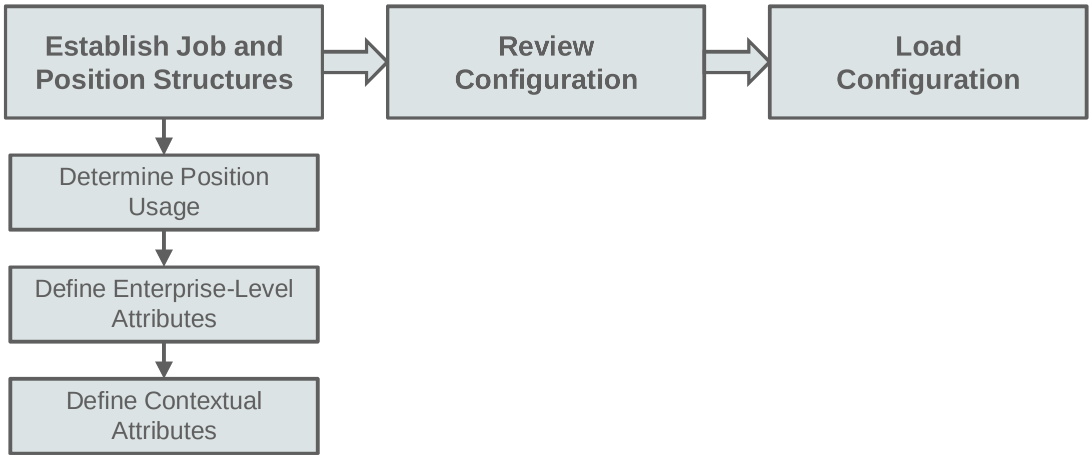
Reviewing the Configuration

The last step in establishing the enterprise structures using the ESC is reviewing the resulting configuration.



Job and Position Structures



The graphic illustrates the process of establishing job and position structures using the Enterprise Structures Configurator. You use a guided process to determine whether you want to use jobs only, or jobs and positions.

Job and Position Usage

- Implementing jobs or a combination of jobs and positions is a key implementation decision.
- The ESC uses the primary industry you selected in the Establish Enterprise Structures task to suggest a recommended approach for using jobs only, or jobs and positions.
- Either use the ESC recommendation or answer a series of questions about how you manage people.

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- You make the decision whether to implement jobs only or a combination of jobs and positions based on the primary industry of your enterprise and how you manage people.
- Example of questions about how you manage people: If a person leaves your company, do you typically:
  - Rehire into the same role?
  - Use the head count and hire to a different job?
  - Create a different post?

Job and Position Usage

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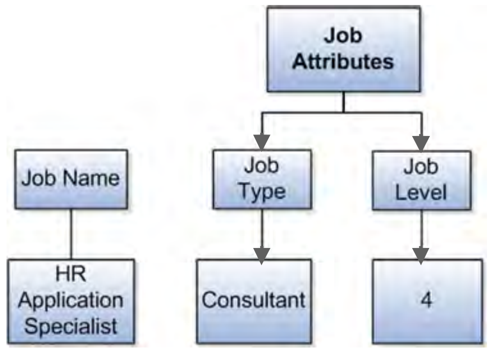
The screenshot displays the Determine Position Usage page within the Establish Job and Position Structures task in the Enterprise Structures Guided Flow. You can see the four train stops that guide you through the job and position setup.

Job and Position Attributes

You can define segments in the position and job flexfields to further identify jobs and positions in the enterprise.



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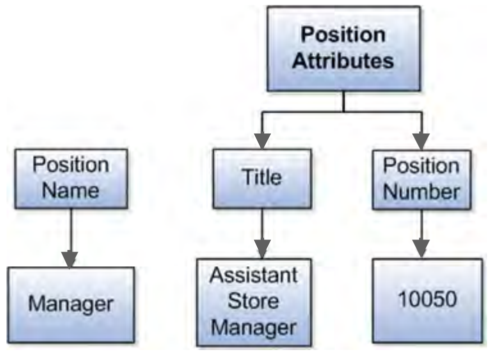
Define attributes for a job to identify additional details about the job, such as the nature of the work that is performed, or the relative skill level required for the job. If these attributes apply to all jobs in the enterprise, then set up enterprise-level job attributes. This graphic demonstrates how job type and job level provide further details for the HR Application Specialist job.

Job and Position Attributes

- Set up enterprise-level attributes to identify separate components of the position name.
- Descriptive flexfields enable you to capture additional information when you create jobs and positions.



- For example, you can set up an attribute for position title and one for position number. The graphic demonstrates how position title and number provide further details for the manager position.
- Defining additional attributes at the enterprise level provides the flexibility to further customize the job and position flexfields.

Define Contextual Attributes for Jobs and Positions

- For jobs, you can define additional job structures for every reference data set defined in ESC.
- Any attributes you set up at the reference data set level will appear alongside any enterprise-level attributes.
- For positions, you can define additional position structures for every business unit defined in the ESC.
- Any attributes you set up at the business unit level will appear alongside any enterprise-level attributes.

Technical Summary Report

In the Manage Enterprise Configuration page, click Review Results for your enterprise configuration to view and download the technical summary report:

The technical summary report lists the enterprise and job structures, displays the management reporting structure, and in addition displays the following:

- **Legislative data groups (LDGs):** The application defines one legislative data group for each country identified in the configuration.
- Name of the legislative data group that will be assigned to the payroll statutory unit generated for each legal entity

Loading the Configuration

- You can load only one enterprise configuration.
- When you load a configuration, the application creates the divisions, legal entities, business units, and so on.
- After you load the configuration, you then use individual tasks to edit, add, and delete enterprise structures.
- You can roll back a loaded configuration.

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Rolling Back a Configuration

The ESC provides the ability to roll back an enterprise configuration in the following circumstances:

- You can roll back an enterprise configuration manually after loading it, for example, because you decide you do not want to use it. Clicking the Roll Back Configuration button on the Manage Enterprise Configuration page rolls back any enterprise structures that were created as a part of loading the configuration.
- If an error occurs during the process of loading the configuration, then the application automatically rolls back any enterprise structures that were created before the error was encountered.

Quiz

You can create multiple configurations to compare different scenarios.

a. True

b. False

Answer: a

Quiz

Which three organization components can you create using the ESC:

a. Enterprise
b. Legal entity
c. Department
d. Division

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Answer: a, b, d

Quiz

You can roll back an enterprise configuration after you load the configuration.

a. True

b. False

Answer: a

Quiz

You can define additional information for every job and position in the enterprise.

a. True

b. False

Answer: a

Summary

In this lesson, you should have learned to describe what ESC is and how to use it to configure your enterprise.

- Understand the purpose of Enterprise and Work Structure tasks
- Set up configuration of individual and multiple enterprise structures
- Create and manage legal entities
- Manage business units, reference data sets, and common sets
- Establish job and position structures

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Directory

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Objectives

After completing this lesson, you should be able to:

- Using Directory
- Person Spotlight
- Maintaining Person Keywords
- Understanding Line Manager Self Service
- Understanding Worker Self Service
- Promoting a Worker

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Using Directory

Use the directory, which you can access from the Home page, to search for people in your organization.

The Directory shows people's public information.

- If you are a worker, you can see more information and start self-service actions. For example, you can maintain your talent profile such as competencies and development goals, update your contacts, share information, and participate in social connections.
- If you're a manager, you can perform actions for your team members here, such as promoting them, sharing information with selected recipients, or providing them with roles.

Note

Each search result relates to an assignment. Any person who has multiple assignments can appear more than once in the search results.

If the search criteria include assignment attributes, such as department or job, only those assignments that satisfy all the search criteria appear in the search results.

Searching from Directory

From the directory, you can:

- Search for and select people in the search results, to view their public information. You can enter a person's name, department, job, phone, or other keywords to search for the person.

Directory search is based on keyword attributes of a person record. You can filter the search to get precise results.

The people you see in the search results and the details you see for those people depend on your security privileges. Anyone in the organization can access public information about people who are designated as public during security implementation. Human resource specialists and line managers can access more detailed information about people in their teams or for whom they are responsible.

Maintaining Person Keywords

Several attributes of person, employment, and profile records are used as person-search keywords.

Note: The people you see in the search results and the details you see for those people depend on your security privileges. Anyone in the organization can access public information about people who are designated as public during security implementation. Human resource specialists and line managers can access more detailed information about people in their teams or for whom they are responsible.

How Person Keywords Are Maintained

Keyword values are copied automatically from the originating records to the PER_KEYWORDS table, where they are indexed to improve search performance. When the value of a keyword attribute changes (for example, if a person acquires a language skill or a new job), an event is raised. In response, services run a process to update the relevant attributes for the person in the PER_KEYWORDS table; therefore, most changes are made in the PER_KEYWORDS table immediately and automatically.

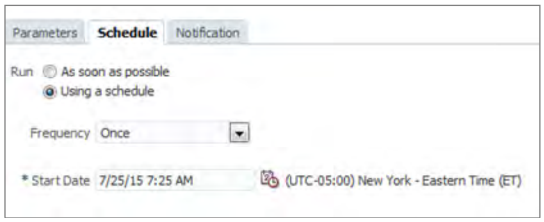
Update Person Search Keywords Process

Although most changes to the PER_KEYWORDS table are made automatically, you need to run the Update Person Search Keywords process regularly because the automatic process does not apply future-dated changes to the PER_KEYWORDS table. Running the Update Person Search Keywords process also ensures that all changes are copied to the PER_KEYWORDS table, despite any temporary failures of the automatic process.

Scheduling the Update Person Search Keywords Process

Schedule

The default schedule for a process is to run as soon as possible. If you click the Advanced button in the Person Keyword Search page, you can specify the exact date and time to run the process, or set the process to run at a specified interval within a date range. If available, you can also select a saved schedule that your administrator has defined.



Notification

You can select to receive an e-mail when the process ends, and also indicate which users are notified if the process ends with a specified status.

You can run the Update Person Search Keywords process manually or schedule it to run at regular intervals. The likely volume and frequency of changes to person records in your enterprise will determine how often you run the Update Person Search Keywords process:

- If the volume and frequency are high, you need to schedule the process to run frequently.
- If the volume and frequency are low, running the process once a month is recommended.

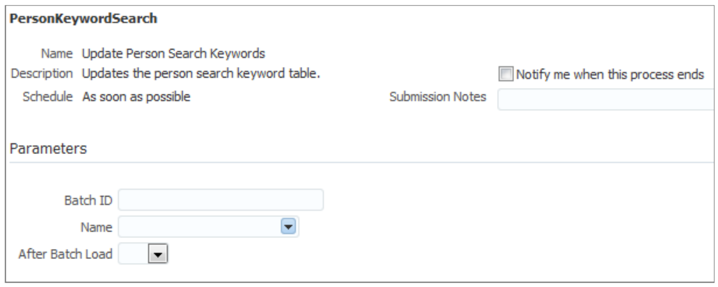
When you run the Update Person Search Keywords process, the PER_KEYWORDS table is refreshed; therefore, it is recommended that you run the process at times of low activity to avoid performance problems.

Scheduling the Update Person Search Keywords Process

Use the **Schedule Person Keyword Crawler** task in the **Setup and Maintenance** work area to schedule the Update Person Search Keywords process.

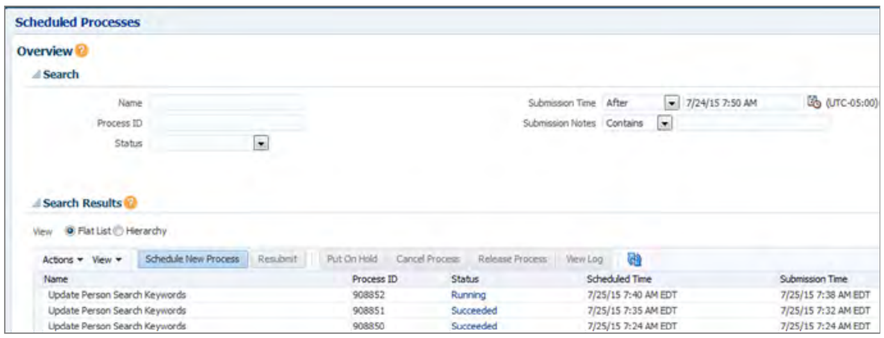
Scheduling the Process

The process is based on an executable job that determines what options are available to you and what the process can do. You can submit the same process using different parameters and other settings.



Running the Update Person Search Keywords Process

Use the **Run Person Keyword Crawler** task in the **Setup and Maintenance** work area to run the Update Person Search Keywords process. After you submit the process, you can monitor it using the Scheduled Processes work area (Navigator - Tools - Scheduled Processes):



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Note: You can also schedule and run processes from the Scheduled Processes work area. Most predefined processes are accessible from their own work areas or from the Setup and Maintenance work area. Use the Scheduled Processes work area (Navigator - Tools - Scheduled Processes) to schedule and run other generic processes that are not accessible from their own work areas.

Person-Record Keyword Searches

The application searches for keyword values in the following attributes of a person's records:

Attributes for Keyword Searches	
Department	Licenses and Certifications
Job Name and Code	School Education
Position Name and Code	Awards and Honors
Person Name	Affiliations
Primary Email	Areas of Interest
Primary Phone	Areas of Expertise
Work location	
Competencies	
Language Skills	

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Access to Restricted Information

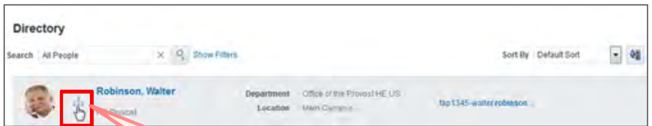
Access to information about a person's competencies, language skills, licenses and certifications, school education, awards and honors, and affiliations is restricted to a person's line managers. Restricted information is not searched and is not included in the search results when the searcher is not a line manager. However, if the match is found in public information, such as areas of expertise, it appears in the search results for any user.

Keyword Indexing

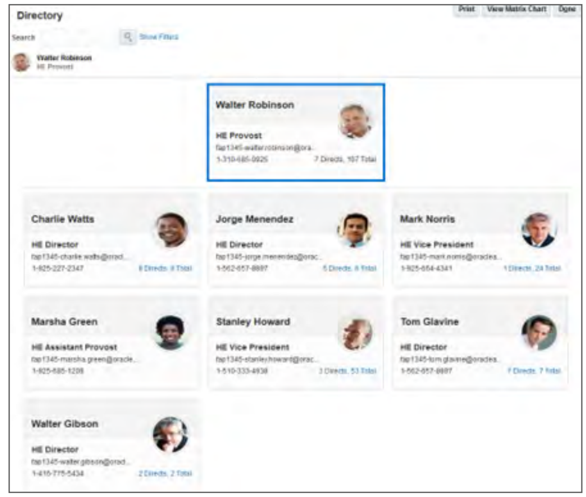
Keywords are indexed values, which means that they are copied from person records and organized in the PER_KEYWORDS keywords table for fast retrieval. Most changes to person records are copied as they occur to ensure that there is no difference between the source and indexed values. However, depending on when the Update Person Search Keywords process was last run, some recent changes to person records may not appear in search results.

Line Manager Self-Service

From the directory, you can view a person in the organization chart, which is based on the line manager hierarchy defined in the person's assignment.



Click on the Org Chart icon from the search results to load a view of the Organization Chart.



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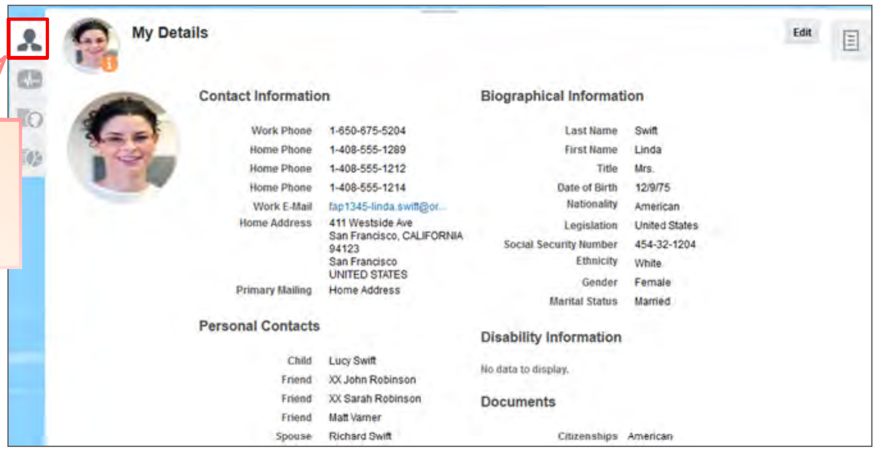
Worker Self-Service

The **About Me > Personal Information** contains detailed information about the worker and their information.



The My Details page displays demographic information about the worker.

Click **Navigator > About Me > Personal Information** for self-service actions, such as maintaining talent profiles (for example, competencies and languages), creating and updating contact details, and participating in social connections.

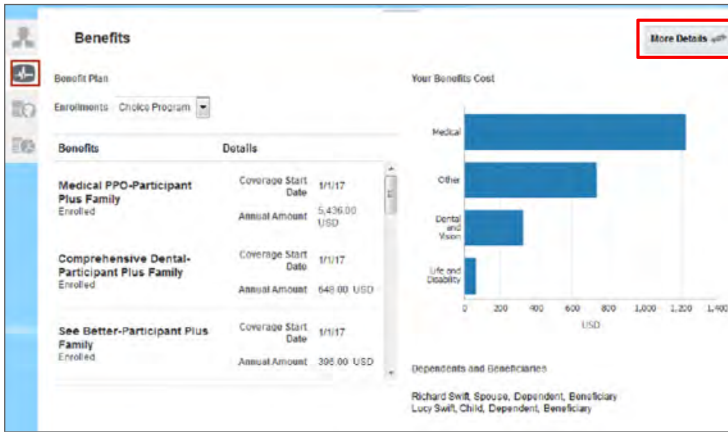
Note: A worker can now view and update disability information for any country.

Actions

- **My Details:** View and manage contact and biographical information. You can also update personal contacts and associated documents.
- **Benefits:** View benefits, such as life and wellness insurance.
- **Payroll:** View and manage pay information, payment methods to define the way of making a payment to a particular bank account.
- **Compensation:** View salary and compa-ratio details.

Benefits

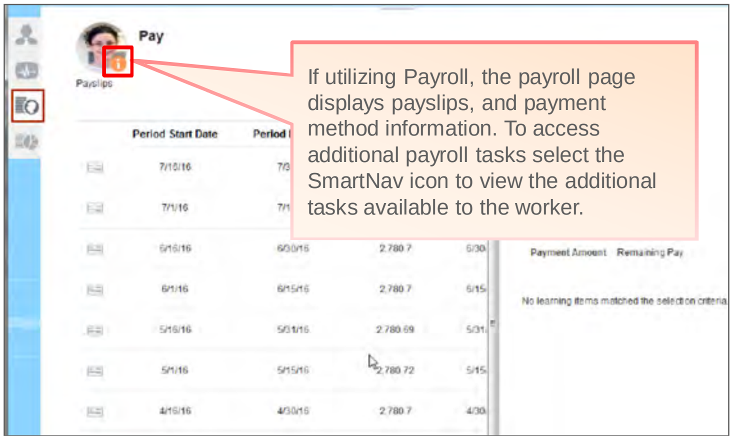
Click the **Benefits** tab on the left panel to view and update Benefits, enrollments, and dependents on this page.



If utilizing Benefits, the Benefits tab displays benefit summary information. To enroll in benefits, report life events or additional items select the More Details button.

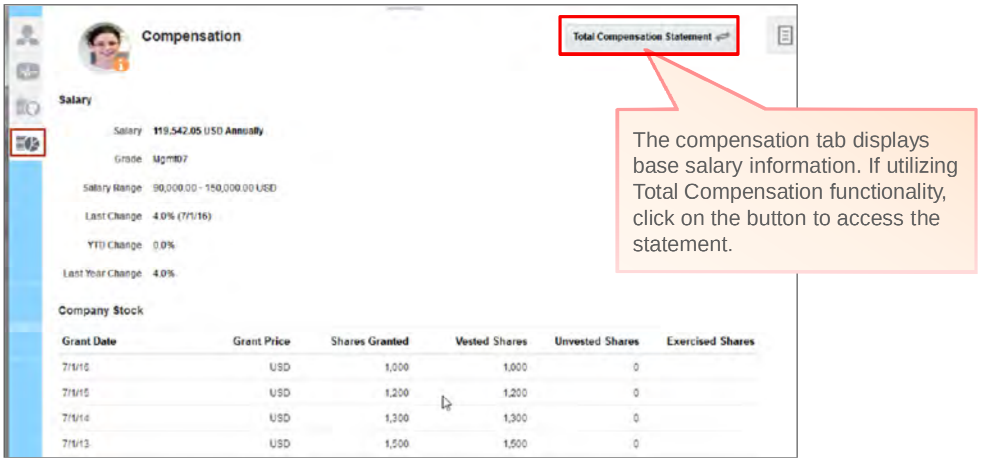
Pay

Click the **Pay** tab to view and edit details, end date, start date, amount, payments, checking and savings account information.



Compensation

Click the **Compensation** tab on the left panel add and update details about compensation on this page.



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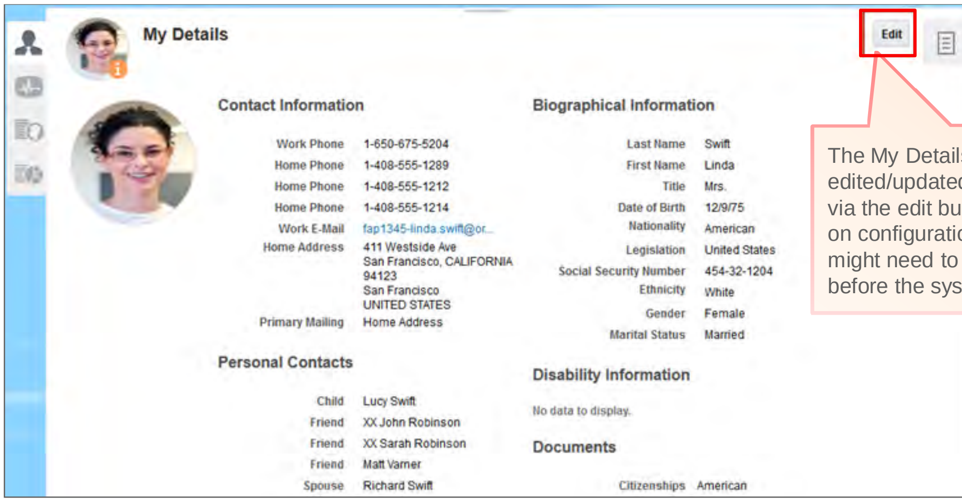
Editing Personal Information

Click **Edit** on the **My Details** page to edit personal information.



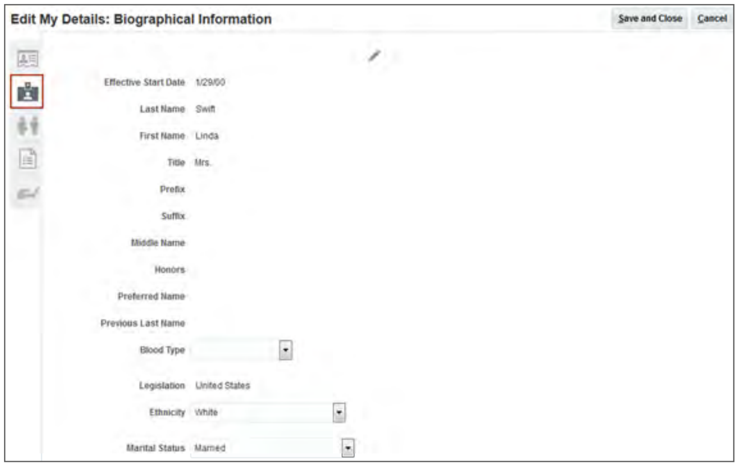
The My Details page can be edited/updated by the worker via the edit button. Depending on configuration some changes might need to be approved before the system is updated.

Edit My Details: Contact Information

You can update contact information, like phone, address, and email on this page.

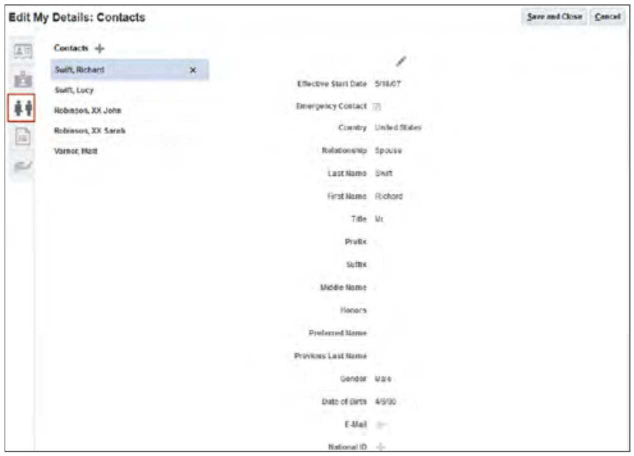
Edit My Details: Biographical Information

You can edit your name, ethnic group and marital status on this page.



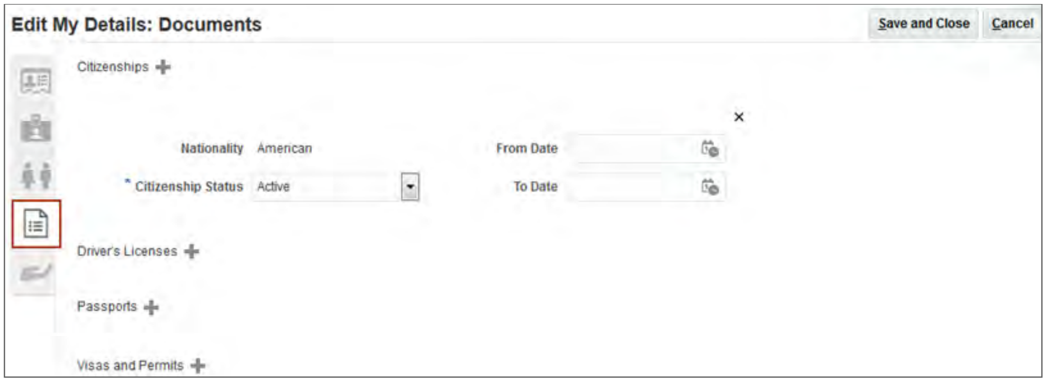
Edit My Details: Contacts and Emergency Contacts

You can add and update your contacts on this page. You can also specify and provide the information of your emergency contact.



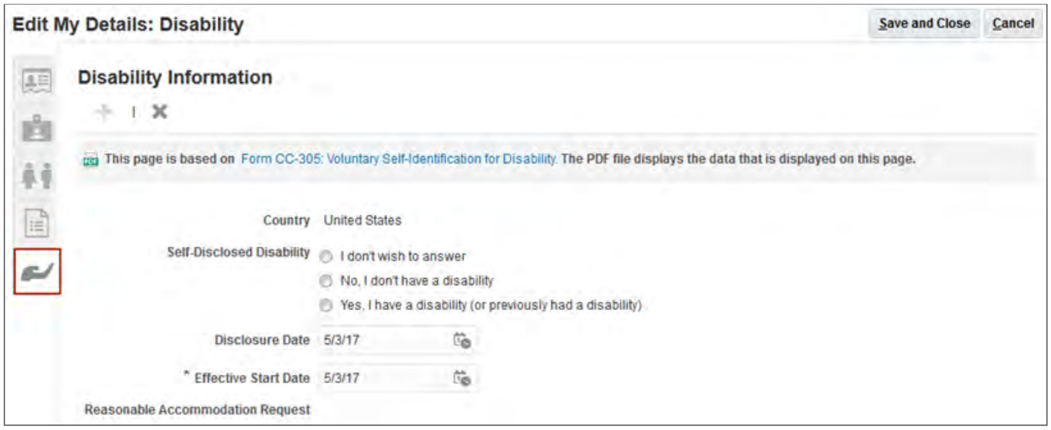
Edit My Details: Documents

You can add information about documents like your driver's licenses, copies of your passport, visas, and others.



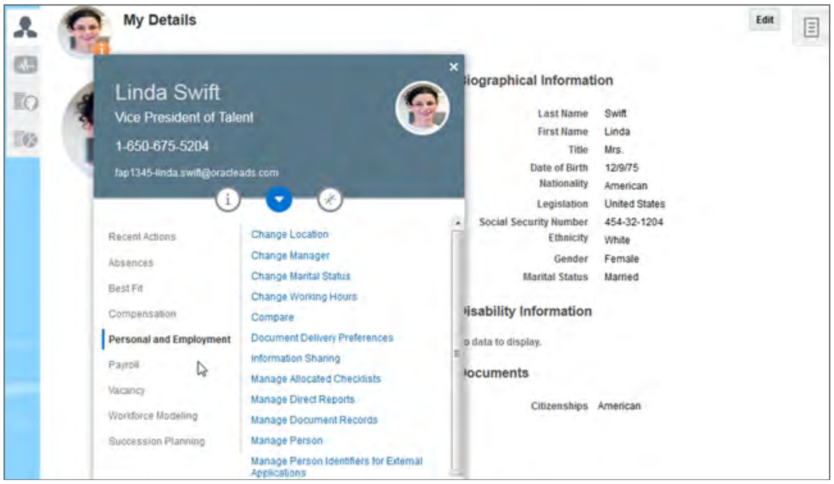
Edit My Details: Disability

You can update disability information, as applicable. You can also attach files or images on this page.



Smart Navigation Options

You can click the icon to access more information about the worker and the actions they can perform depending on their role.



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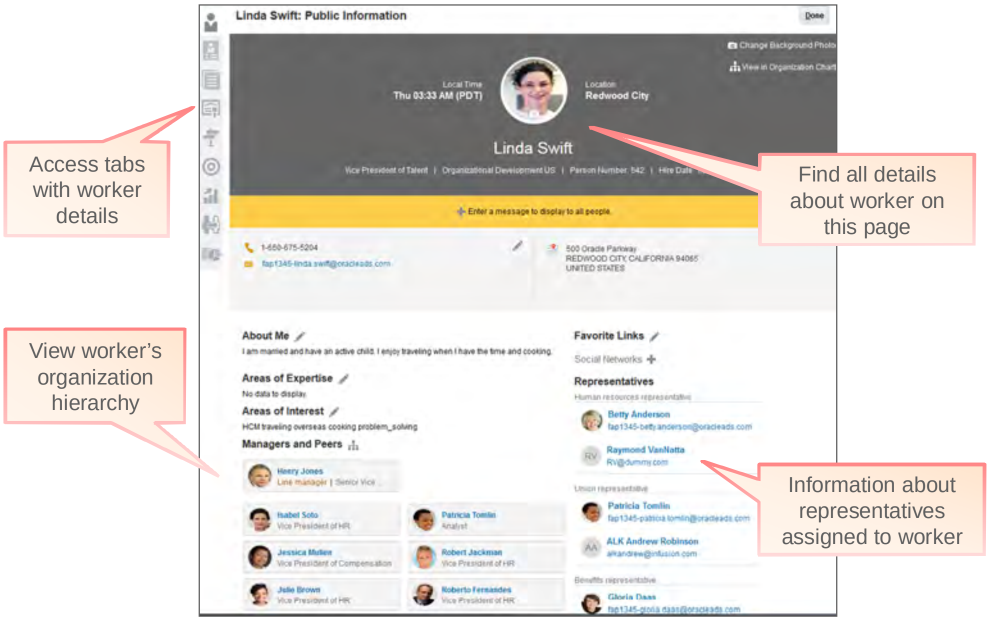
On this page, you can Initiate actions, such as changing an address or transferring a worker. The available actions depend on the security privileges of the user. For example, a line manager can transfer a subordinate; however, peers cannot transfer a worker.

Using Person Spotlight



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Person Spotlight comprises of personal and employment information about a person. The type and quantity of information depend on the security access of the person viewing the page.

You can:

- View and update contact and professional information, contacts, and documents of record
- View your benefit plans, benefits cost, dependents and beneficiaries, and navigate to the Fusion pages for additional details
- View your payslips and manage payment methods
- View your salary and compensation, and navigate to the Fusion pages for additional details

Quiz

The available actions in a person's portrait depend on the security privileges of the user.

a. True

b. False

Answer: a

Quiz

The organization chart presents line managers with a hierarchical view of people in their organizations.

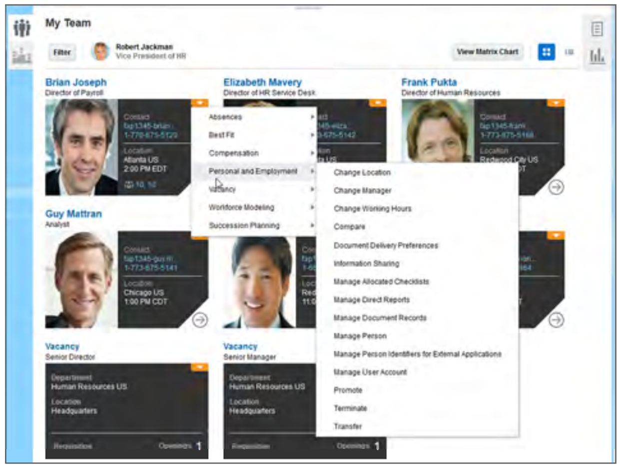
a. True

b. False

Answer: a

Line Manager Functions

The following screenshot displays the page where managers can view and manage their direct and indirect reports:

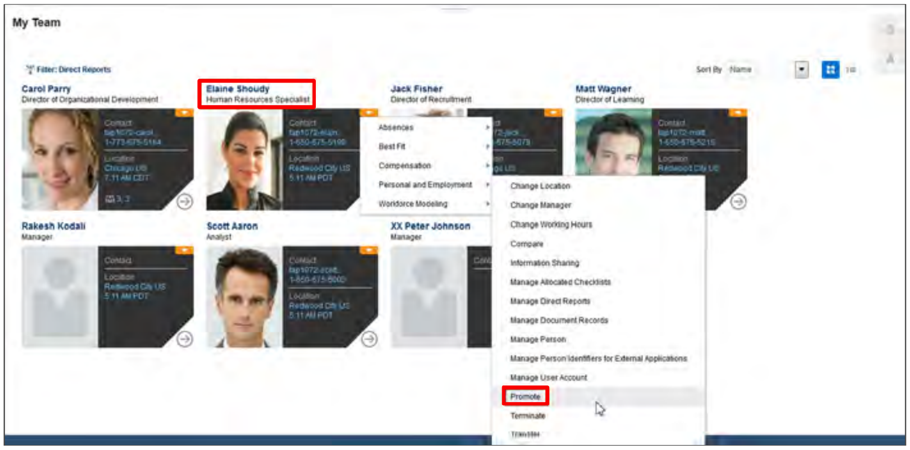


Users having the Line Manager role can see the following additional icons:

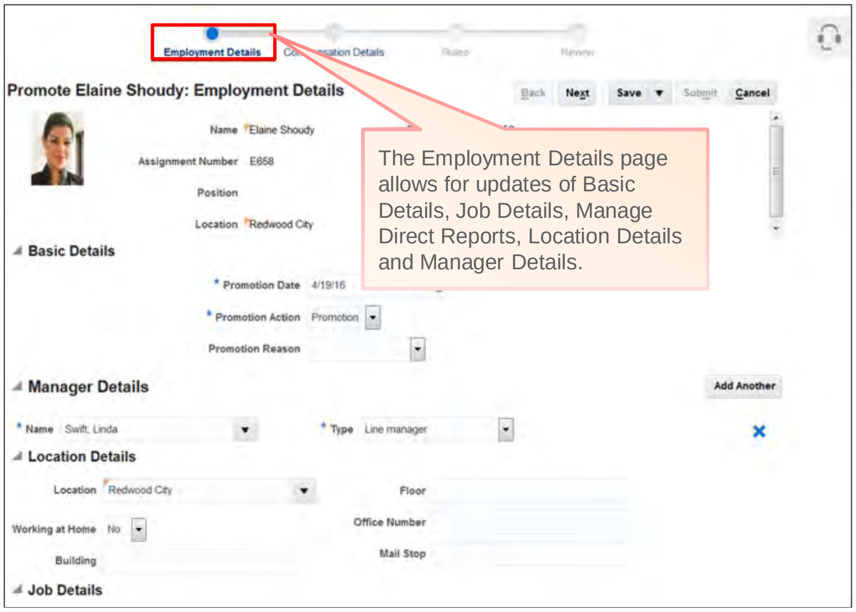
- **My Team:** Managers can view their direct and indirect reports, initiate actions for their workers, and access reports, analytics, and other related links that take them to the Fusion pages.
- **Team Compensation:** Managers can view the salary and compensation details of their workers, view analytics, and navigate to the Fusion pages to perform further actions.
- **Team Talent:** Managers can view the performance and goals information of their workers, view related analytics, and navigate to the Fusion pages linked from here.

Line Manager: Actions – Promoting a Worker

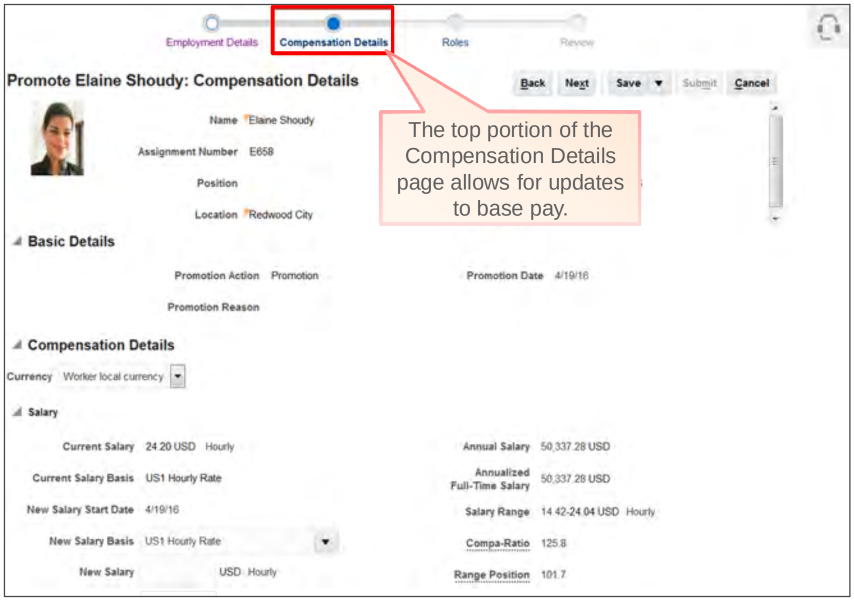
- Line managers can take several actions for their direct reports. They can perform HCM tasks such as promote or transfer the members in their team.
- In this example, we will see line manager, Linda Swift, promoting her direct report Elaine Shoudy.



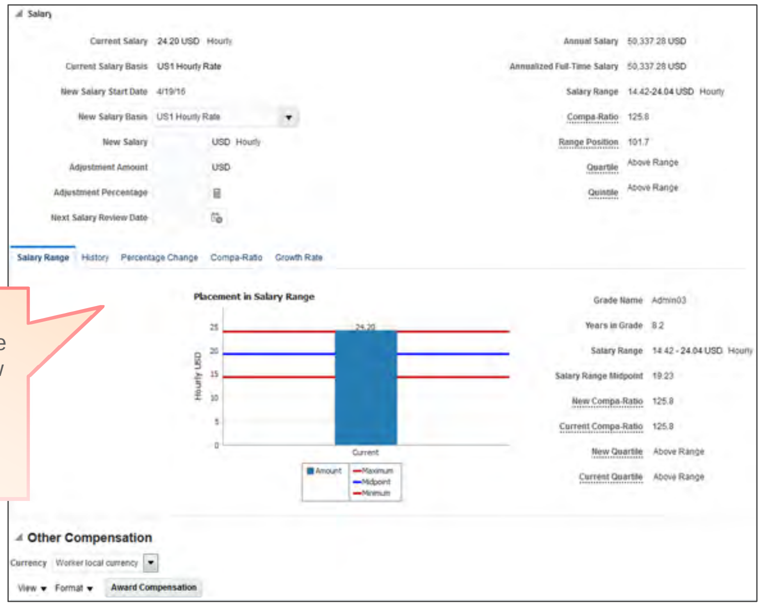
Line Manager: Promote Elaine Shoudy – Employment Details



Line Manager: Promote Elaine Shoudy – Compensation

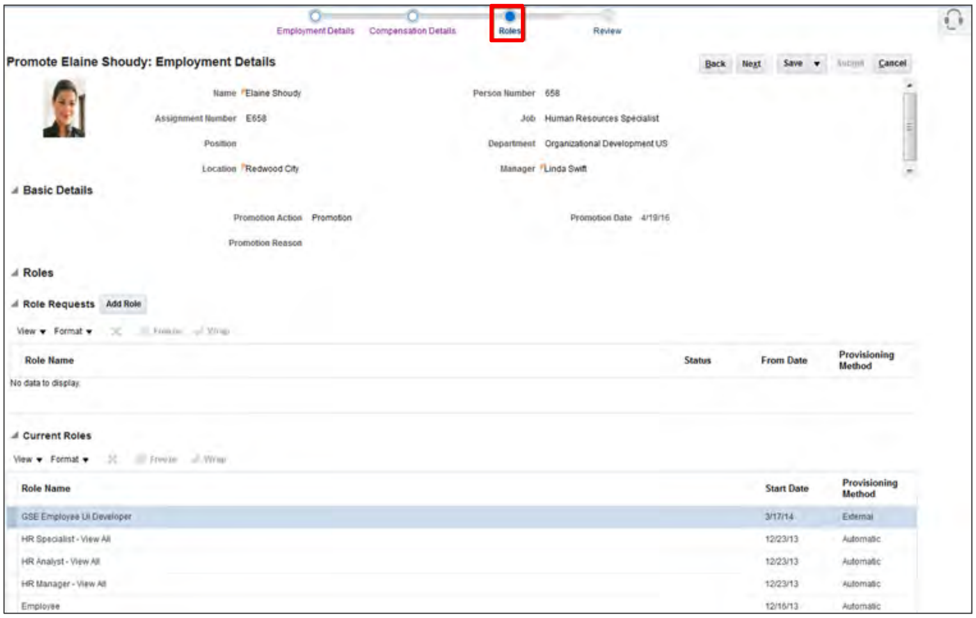


Line Manager: Promote Elaine Shoudy – Compensation Analysis Details



The bottom portion of the Compensation Details page allows the manager to view compensation analysis as well as award additional compensation such as a relocation bonus.

Line Manager: Promote Elaine Shoudy – Roles



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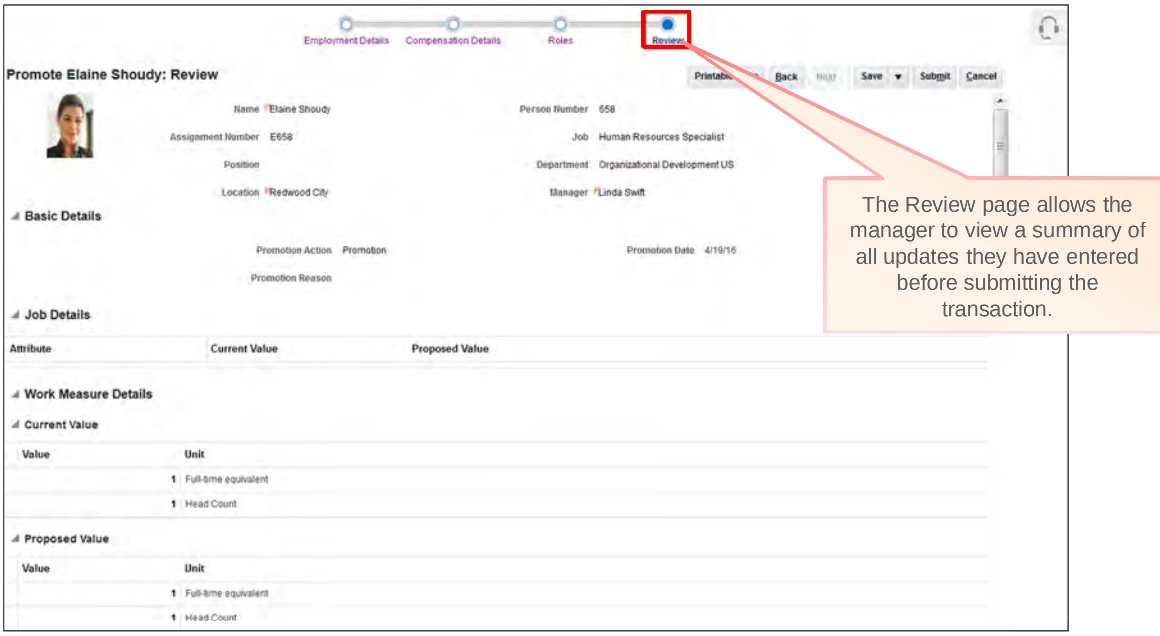
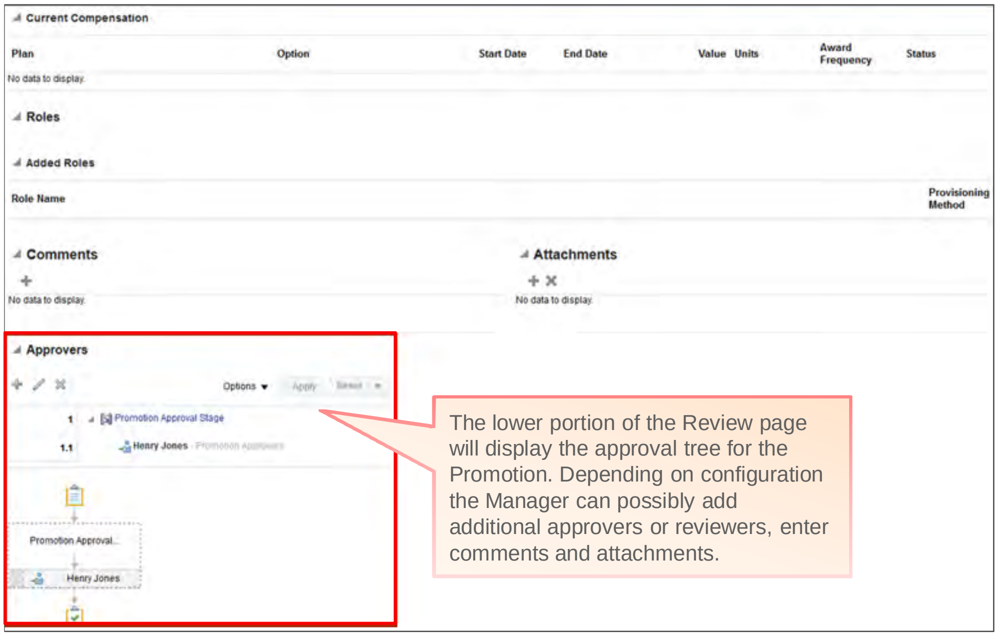
Line Manager: Promote Elaine Shoudy – Review



Line Manager: Promote Elaine Shoudy – Approval Flow



The lower portion of the Review page will display the approval tree for the Promotion. Depending on configuration the Manager can possibly add additional approvers or reviewers, enter comments and attachments.

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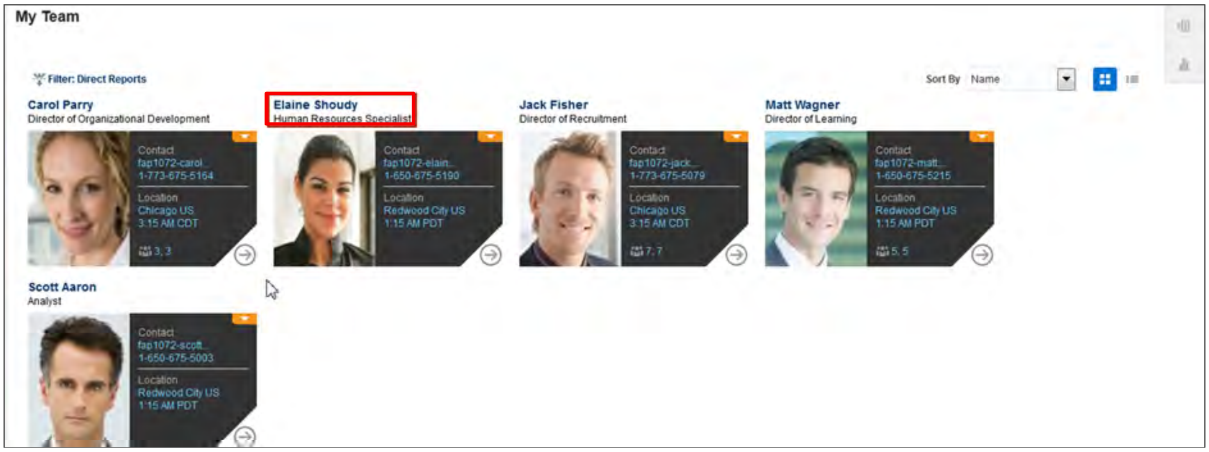
Line Manager: Reviewing Worker's Details

Line manager can click on a worker's name to view their details. For example, clicking on Elaine Shoudy's name provides her manager with her employment details.



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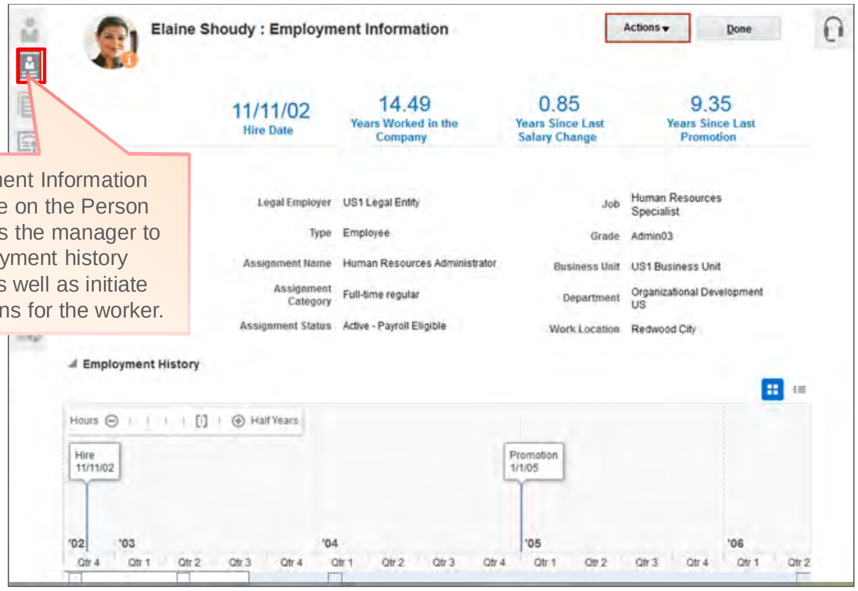
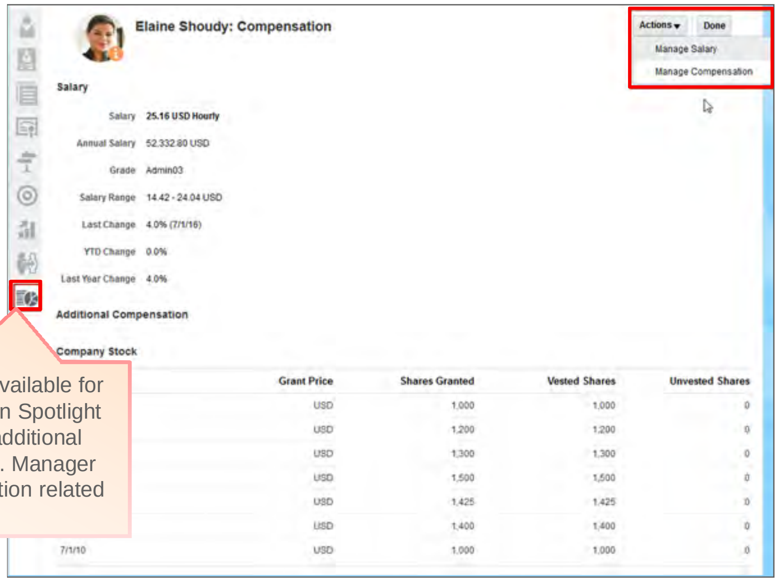
Line Manager: Reviewing Elaine Shoudy's Employment Information



The Employment Information page available on the Person Spotlight allows the manager to view employment history information as well as initiate additional actions for the worker.

Line Manager: Reviewing Elaine Shoudy's Compensation Information



The Compensation page available for the Manager via the Person Spotlight displays base pay, and additional compensation information. Manager can also initiate compensation related actions.

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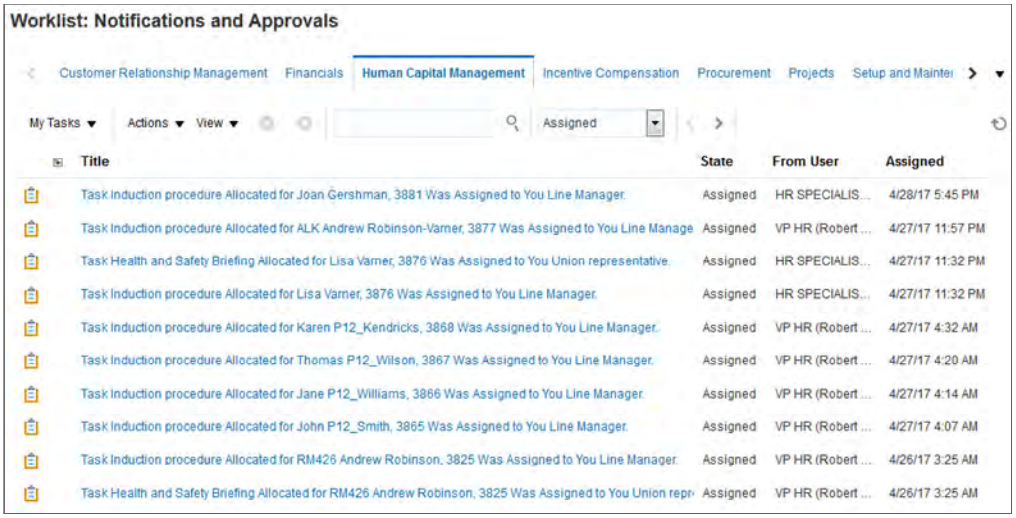
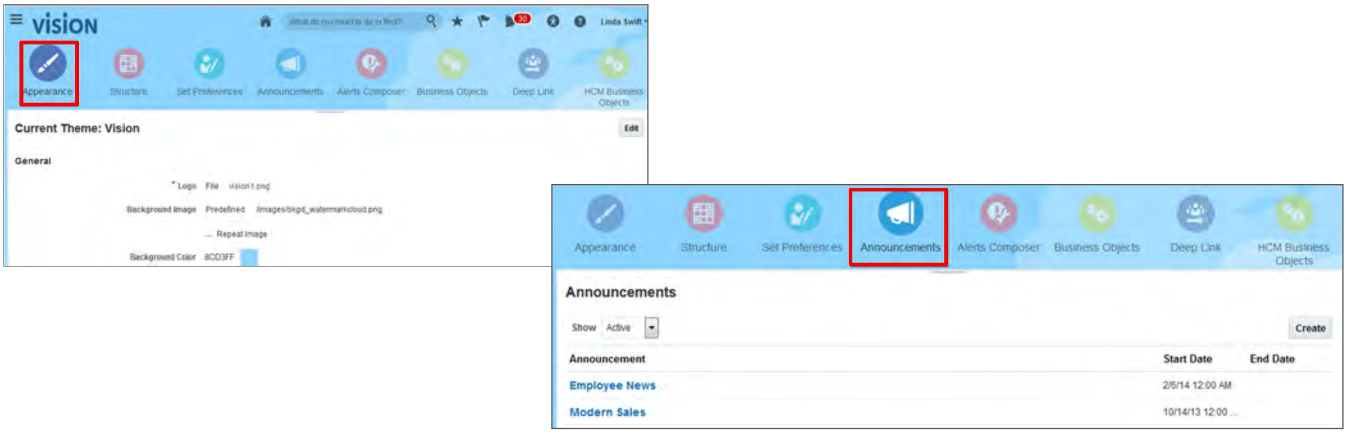
Notifications and Approvals

In the Worklist page, you can view your notifications and take actions on them.



Appearance and Announcements

Users having the Human Resources (HR) Specialist role can access the Appearance and Announcements pages to modify the appearance settings and create announcements.



Including Calendar Event Messages

Calendar events identify dates, such as public holidays, on which the standard work patterns of a workforce are likely to be disrupted. When you select a calendar event category, such as public holiday, a message for each calendar event in that category appears in relevant portraits for the duration of the event. How relevant portraits are identified depends on whether you use work schedules:

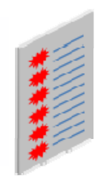
- If you use work schedules, relevant portraits belong to people who have a primary schedule or schedule assignment that includes the calendar event as an exception.
- If you do not use work schedules, relevant portraits belong to people who are in the locations or organizations associated with the calendar event.

For example, St. Stephen's Day is a public holiday in Germany but not in France or India. If you select the public holiday event category, this message would appear on St. Stephen's Day in the portraits of workers in your German locations. The message does not appear:

- For workers in the German locations whose primary schedule or schedule assignment does not include this calendar event as an exception
- For workers in the French or Indian locations

Including Custom Messages

- Custom messages alert users to events other than calendar events that could affect worker availability. For example, assume that your sales team has relocated for two weeks while building works are completed. You want the following message to appear in the portraits of the sales team for that period:
- The sales team is currently working from building 370. Use mail stop 209. Phones are unaffected.



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When you create the custom message, you select the target department (sales) and the target location (building 370). The message appears in the portraits of all workers who have at least one active assignment in the sales department in building 370 during the specified period. At the end of that period, the message disappears from portraits; however, you can edit any component of the message at any time. For example, if the building work takes longer than expected, or if it resumes later in the year, you can edit the message.

If the message applies to a hierarchy of departments, you select the target organization hierarchy and, if appropriate, the top organization when creating the message. The target organization hierarchy always identifies a department hierarchy. The priority value, which is unique for the specified period, determines where the message appears relative to other custom messages in the same portrait.

Practices

- 15-1: Line Manager Self-Service
- 15-2: Worker Self-Service
- 15-3: Changing Your Personal Information
- 15-4: Browsing the Directory
- 15-5: Transferring a Worker (as a Line Manager)

Using your activity guide, perform the specified practices.

Quiz

You can view notifications and approvals on the Worklist page.

a. True

b. False

Answer: a

Quiz

What determines where the message appears relative to other custom messages in the same user?

a. Department hierarchy

b. Priority factor

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Answer: b

Summary

In this lesson, you should have learned how to:

- Maintain Person Keywords
- Understand Line Manager Self Service
- Understand Worker Self Service
- Promote a Worker

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