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Integrated Cloud Applications & Platform Services

Oracle HCM Cloud: Global Human Resources

Activity Guide

D96993GC40

Edition 4.0 | May 2017 | D100376

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Instructor Demonstration L13-4: Creating an Assignment Status

Demonstration Overview

In this demonstration, as a Human Resources (HR) specialist, you create a user assignment status named Temporary Assignment. The HR Specialist maintains assignment statuses, which determine whether an assignment is eligible for payroll processing, active, inactive, or temporarily suspended.

Demonstration Assumptions

- Time: < 5 minutes.

Demonstration Tasks

Sign In and Navigate

1. Ensure you sign in as **hcm_implXX**.
2. Click the arrow to the right of the **hcm_implXX** ID, in the upper right corner of the page.
3. Select **Setup and Maintenance**.
4. Click **Implementation Projects**.
5. Select your implementation project and ensure that you have expanded tasks for **Workforce Deployment > Define Common HCM Configuration > Define Workforce Records > Define Employment Record Values**.

Create an Assignment Status

1. In the **Manage Assignment Status** row, click the **Go to Task** icon to open the **Manage Assignment Status** page.
2. Click the **New** icon.
3. In the **User Status** field, enter **XXTemporary Assignment**.
4. In the **Assignment Status Code** field, enter **XXTEMP_ASSIGNMENT**.

   Note: Enter a unique code since this value uniquely identifies the assignment status.
5. In the **HR Status** field, select **Active**.
6. In the **Pay Status** field, select **Process**.
7. Leave the **No** option selected in the **Default** field.
8. Click the **Save** button, which causes a **Warning** dialog box to appear.
9. Click **OK** in the dialog box to return the **XX Workforce Deployment** page.
10. Click **Done**.

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Instructor Demonstration L14-1: Configuring a Seniority Date

Demonstration Overview

As a Human Capital Management (HCM) application administrator, you configure the rules for creating and defaulting seniority dates. In this demonstration, you configure the following seniority date: Legal Employer Seniority Date – Person Level.

Demonstration Assumptions

- Time: < 20 minutes.

Demonstration Tasks

Sign In and Navigate

1. Ensure you sign in as **hcm_implXX**.
2. Click the arrow to the right of the **hcm_implXX** ID, in the upper right corner of the page.
3. Select **Setup and Maintenance**.
4. Click **Implementation Projects**.
5. Select your implementation project and ensure that you have expanded tasks for **Workforce Deployment > Define Common Applications for Human Capital Management > Define Enterprise Structures for Human Capital Management > Define Workforce Structures > Configure Seniority Dates**

Configure a Seniority Date

1. Enter **Configure Seniority Dates** in the **Name** field, and click **Search**.
2. In the **Search Results** section, click the task name in the **Configure Seniority Dates** task row to open the **Configure Seniority Date Rules** page.

   Note: By default, the following two seniority dates are configured in the page: **Enterprise Seniority Date – Person Level** and **Legal Employer Seniority Date – Work Relationship Level**.
3. Click the **Add (+)** icon to configure an additional seniority date.
4. In the new empty row, do the following:
   a. In the **Active** list, select **Yes** to enable the seniority date.
   b. In the **Seniority Date** list, select **Legal Employer Seniority Date – Person Level**.

      <u>Information</u>

      The predefined code values in the list are defined in the ORA_PER_SENIORITY_ITEMS lookup type.
   c. In the **Attribute** list, select **Legal Employer**.

      <u>Information</u>

      Discuss that you can define the seniority date configuration based on the seniority attribute. For example, legal employer is the seniority attribute in case of a legal employer seniority date and enterprise is the seniority attribute in case of an enterprise

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seniority date. When the seniority attribute is logically created or modified, the corresponding seniority date will be populated in the system according to the rules in the setup.

d. In the **Level** field, select **Person**.

   Note: When you select a value from the **Seniority Attribute** and **Level** lists, the values in the **Object** and **Source** fields are automatically populated. For example, if you select **Legal Employer** and **Person**, the **Object** field is populated with the **Work Relationship** value and the **Source** field with the **First Matching Work Relationship Start Date** value. You cannot edit the values in the **Object** and **Source** fields.

   <u>Information</u>

   Discuss that you can configure seniority dates at the person, work relationship, and assignment levels. At the person level, all the work relationships and assignments for the given person will be considered while deriving the seniority date. At the work relationship level, all the assignments for the given work relationship will be considered while deriving the seniority date. At the assignment level, all the date effective records for the given assignment will be considered while deriving the seniority date.

   Discuss the **Object** and **Source** fields:

   Object: Identifies the business object associated with the seniority attribute.

   Source: Rule that defines how the seniority date is populated. For example, the First Matching Work Relationship Start Date rule indicates that the first work relationship to match the seniority rule is used to populate the seniority date. The start date of this work relationship will populate the seniority date.

e. In the **Allow Edit** field, select **No**.

   Note: You can specify whether users can override the seniority date using the Manage Seniority Dates task by selecting a value. If you set the value in this field to **No**, you cannot edit the corresponding seniority date on the Manage Seniority Dates page.

5. Click **Save** which causes a Warning dialog box to appear.
6. Click **Yes** which causes a Confirmation dialog box to appear.
7. Click **OK**.

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Instructor Demonstration L14-2: Creating a Mass Transfer

Demonstration Overview

As part of the company reorganization, all workers in the US Support business unit must be transferred to the US1 business unit. The transfer involves a change in department and work location. In this demonstration, you create a mass transfer.

Demonstration Assumptions

- Time: < 10 minutes.
- Create a mass assignment change Mass Transfer. The following points summarize key decisions for this mass transfer:
    - The new department name is Global Support Centers and location name is Redwood City.
    - Do not include assignments with future changes. Transfer these assignments separately and not using the mass update.
    - Include assignments associated with employment terms.

Demonstration Tasks

Sign In and Navigate

1. Ensure that you are signed in as **hcm_implxx**.
2. On the **Home** page, click **My Workforce** and select **Mass Updates** work area to access the **Manage Mass Updates** page.

Create a Mass Transfer

1. In the **Search Results** region, click **Create** to open the **Create Mass Assignment Change: Basic Details** page.
2. In the **Name** field, enter **Test Mass Transfer**.
3. Retain the current date in the **Effective Date** field.
4. In the **Action** field, select **Transfer**.
5. You do not want to include assignments with future changes. In the **Assignments with Future Changes** field, select **Show errors and exclude assignments**.
6. Click **Next** to open the **Create Mass Assignment Change: Population** page.
7. Click **Select and Add** to open the **Select and Add: Person** window.
8. In the **Department** field, search for and select **Sales US**.
9. Click **Search**.
10. Select a row and click **CTRL+A** to select all the rows in the search results.
11. Click **Apply**.
12. Click **OK**.

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13. Click **Next** to open the **Create Mass Assignment Change: Changes** page.
14. In the **Business Unit** field, search for and select **US1 Business Unit**.
15. In the **Department** field, search for and select **Sales Central US**.
16. In the **Location** field, search for and select **Redwood City**.
17. Click **Next** to open the **Create Mass Assignment Change: Verification** page. You will get a **Processing** box validating data.
18. After the data is processed and validated, select all rows and click **Verify Changes**. There are no errors or warnings.

    Note: The **Verify Changes** button takes some time to get enabled.
19. Click **Next** to open the **Create Mass Assignment Change: Review** page.
20. The current and proposed values appear fine. Click **Submit**, which causes a **Warning** dialog box to appear.
21. Click **OK**, which causes a **Processing** dialog box to appear. After the processing is complete, the **Manage Mass Updates** page is displayed.

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Instructor Demonstration L17-1 Appendix A: Function and Data Security in Action

Demonstration Overview

As an Oracle Fusion Applications user:

- You access functions through the roles that have been assigned to you. In this demonstration, you show how function security secures user access to dashboards, work areas, and work-area task-pane contents.
- You access data via the roles that have been assigned to you. In this demonstration, you show the data available for viewing by different users based on their assigned roles.

Demonstration Assumptions

- Time: 10 minutes

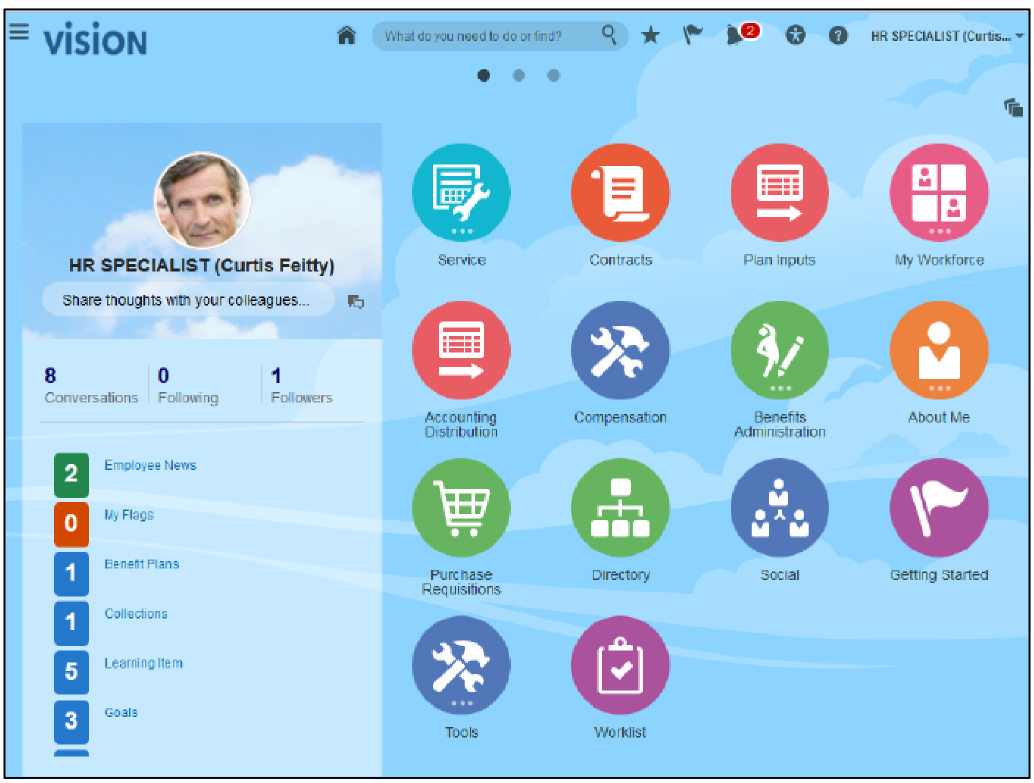
Demonstration Tasks

Sign In and Navigate

- Sign in as user **Curtis.Feitty**.

Review Home Page Contents

1. Review the contents of the **Home** page that are available to Curtis Feitty.



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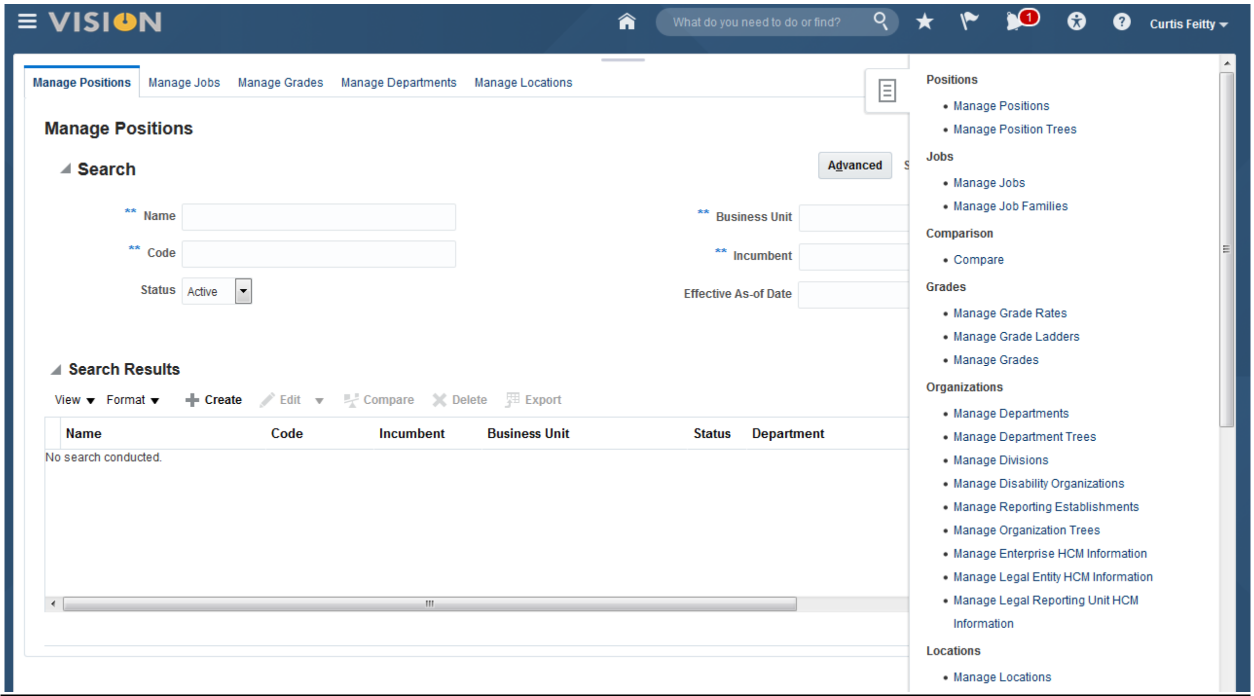
Information

Function security is used to secure each menu entry that corresponds to a work area or dashboard, and each of these is secured with a function security privilege. The function security privileges that are granted to the user (through his or her roles) control the menu entries that the user can see.

2. Click **My Workforce > Workforce Structures**.



Information

Function security also secures the task panel (available on the right side of the page) for a work area. Each of the task panel entries corresponds to a task flow, which is secured with a function security privilege. The function security privileges that are granted to the user (through his or her roles) control the task pane entries that the user can see.

Review User Roles

1. On the **Home** page, select **About Me** > **My Account**.

   Location: Edit User Account Details page

2. Scroll down to the **Current Roles** section.

   Information

   Curtis is assigned a great many roles, which is useful for testing (and for training courses like this). He has functional manager roles, as well as IT Security Manager. In the real world, few users would have this many different and powerful roles.

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3. Sign out, and then sign back in as **Mitch.Blum**.

   Information

   To sign out, click **Curtis Feitty** in the menu bar and then click **Sign Out**.

4. On the **Home page**, notice that Mitch does not have access to the **Workforce Structures** option or many other options that appear on Curtis's **Home** page.

   Information

   Mitch has fewer roles than Curtis does. Mitch's roles do not give him access to the Workforce Structures function, so it does not appear on his menu.

5. Sign out.

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