

Oracle Fusion Cloud HCM

How do I adopt Redwood for HCM?



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Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Some application pages have help icons  to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

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Thanks for helping us improve our user assistance!

0 How do I get started adopting Redwood for HCM?

These are the steps to adopt Redwood:

1. Inventory your custom assets, learn about the HCM Redwood Personalization Helper tool, and prepare an adoption plan.

To plan Redwood adoption work, review the changes to your deployment that will need to be addressed:

- Page changes
- Personalizations
- Custom job roles
- Auto complete rules
- Feature changes

2. Prepare a test environment for Redwood testing.
3. Make the required changes in the test environment, and test thoroughly.
4. Deploy Redwood to production.

Plan your adoption sequence

Here's the adoption sequence we recommend for HCM:

1. Set up learner and manager self-service pages in Oracle Learning.
2. Enable enhanced time cards and all Journeys.
3. Optionally enable mobile time cards.
4. Enable the Primary Employee and Manager self-service pages for Recruiting, Global HR, Benefits, Absence, Payroll, and Talent Management.
5. Enable the time entry experience in Oracle Time and Labor.
6. Enable worksheet, budgeting, and planning pages for workforce compensation.
7. Set up the learning administrator experience in Oracle Learning.
Schedule your adoption work around HCM events such as benefits enrollment, performance reviews, or year-end payroll.

Inventory your Redwood page personalizations

Assess the effort and convert your existing Page Composer and HCM Experience Design Studio personalizations to new Redwood pages and flows. Go to [Oracle Cloud CoE Central](#) to download the HCM Redwood Personalization Helper tool corresponding to your release and platform and move it to the working directory you created.

The tool lets you:

- Run the tool in Report Only mode to see which personalizations can be converted and migrated.
- See a list of personalized pages created in Page Composer and Transaction Design Studio in a PDF report or XLS spreadsheet.
- See which page personalizations the tool can convert to Visual Builder (VB) Studio Express mode.
- Convert the personalizations into a VB Studio workspace when you run the tool in Migrate and Report mode.

You can run the tool in Report Only mode for all HCM products. You can convert page personalizations for all HCM products except Absences, Global Payroll, and Time and Labor.

Export your personalizations to the HCM Redwood Personalization Helper tool

1. Sign into the test environment associated with your Visual Builder Studio instance.
2. Go to the Navigator menu and select **Configuration > Migration**.
3. Click **Create Migration Set** in the Outgoing tile.
4. Click **Move All Changes**.
5. Name the configuration set and deselect all options.
6. Save your changes to send the request to export.
7. After the process completes, download the archive and extract it.
8. Open the extracted folder and navigate to the ADF folder.
9. Copy the CS_ADF_*.jar file to the working directory with the HCM Redwood Personalization Helper tool .exe file.

Run the HCM Redwood Personalization Helper tool report

To run the tool, you must have exported your personalizations from your test environment to your working directory.

1. Launch the HCM Redwood Personalization Helper tool that you downloaded and installed.
2. Select your working directory.
3. Select **Report Only Mode**.
4. Select the ADF Personalization File that you exported.
5. Select the modules you want to evaluate. They're grouped by VB Studio extensions.
6. If flexfields are used in your personalized pages, select **Include Flexfields** and enter the environment URL and user credentials.

The tool uses a REST API to retrieve flexfield metadata.

Personalization Helper tool report

You'll find an output folder in the working directory with these files:

- HTML output file: Lists the modules selected for processing, along with the related personalizations from Transaction Design Studio and Page Composer.
- XSLX output file: Lists all the modules (including personalization details) in the first two tabs. For each module, the tool creates a tab for Transaction Design Studio (TDS) and for Page Composer personalizations.

The report provides details on any personalizations that weren't migrated and what to do next.

Assess your adoption work

The adoption work varies depending on your business requirements and configuration.

Note: You'll need the personalization report you created by running the Personalization helper tool in Report Only mode.

Use this table to assess Redwood page changes.

Areas to consider	What to do
Is there new functionality delivered with this Redwood page?	Review Oracle What's New for more information.
Does this Redwood page come with security privilege changes that I'll need to apply to my custom job roles?	Review Oracle What's New to see if there are security privilege changes for the page.
Does the Responsive version of this page include Experience Design Studio or Page Composer personalizations?	Check the Personalization Helper tool report to see if personalizations exist.
Does this page require manual VB Studio Express personalization?	Check the Personalization Helper tool report to see if the tool can convert and migrate the page. If not, you can manually personalize it using Visual Builder Studio express.
Does this page have any autocomplete rules applied to it?	If yes, reconfigure the autocomplete default rules using Visual Builder Studio Express. Autocomplete validation rules work as is.
Does the page change require altering your organization's procedures, policies, or Oracle Guided Learning?	Evaluate the change impact on your employees.

1 How do I enable HCM Redwood pages?

You must establish a dedicated test environment with a Visual Builder Studio instance associated with it.

You need to set profile options, run search index processes, and update custom job roles. Before you adopt each set of Redwood pages, run a Production-to-Test refresh to the test environment.

Enable Oracle Search for Redwood

Redwood flows require Oracle Search. If you've enabled Oracle Search features before, some of these steps might already be completed in your environment.

1. In Setup and Maintenance, search for and click the **Manage Administrator Profile Values** task.
2. For each profile option listed in this table, search for and set each profile's level and value.

Profile Option Code	Profile Display Name	Application	Module	Profile Level	Profile Value
ORA_FND_SEARCH_EXT_ENABLED	Enable/Disable Search Ext Framework	Oracle Middleware Extensions for Applications	Oracle Middleware Extensions for Applications	Site	Yes
HRC_ELASTIC_SEARCH_ENABLED	HRC: Enable Elastic Search	HCM Common Architecture	Search Framework	Site	Y
PER_SEARCH_LOGIN_EVENT_PUB	PER: User Login Event Publication for Search	Global Human Resources	Security	Site	ATOM
AFLOG_ENABLED	FND: Log Enabled	Oracle Middleware Extensions for Applications	Application Logging	Site or User for the user running ACL processes	Yes
AFLOG_LEVEL	FND: Log Level	HCM Common Architecture	Application Logging	Site or User for the user running ACL processes	Severe
AFLOG_MODULE	FND: Log Module Filter	Global Human Resources	Application Logging	Site or User for the user running ACL processes	%
ORA_PER_ORACLE_SEARCH_WORKERSLOV_ENABLED	Enable Oracle Search Workers LOV	Global Human Resources	Personal Information	Site	Yes

3. If your implementation includes a module that's listed in this table, set the profile value to Y or Yes for the Site profile level:

Profile Option Code	Profile Display Name	Application	Module
ORA_WLF_ORACLE_SEARCH_LEARNINGITEM_ENABLED	ORA_WLF_ORACLE_SEARCH_LEARNINGITEM_ENABLED	Work Life	Learning
ORA_WLF_ORACLE_SEARCH_LEARNINGRECOMMENDATION_ENABLED	ORA_WLF_ORACLE_SEARCH_LEARNINGRECOMMENDATION_ENABLED	Work Life	Learning
ORA_WLF_ORACLE_SEARCH_LEARNINGRECORD_ENABLED	ORA_WLF_ORACLE_SEARCH_LEARNINGRECORD_ENABLED	Work Life	Learning
ORA_WLF_ORACLE_SEARCH_LEARNINGBOOKING_ENABLED	ORA_WLF_ORACLE_SEARCH_LEARNINGBOOKING_ENABLED	Work Life	Learning
ORA_HWM_ELASTIC_SEARCH_ENABLED	HWM Enable Oracle Search	Workforce Management	Workforce Management
HRT_PROFILE_ORACLE_SEARCH_ENABLED	HRT_PROFILE_ORACLE_SEARCH_ENABLED	Profile Management	Profile Management
ORA_PER_CHK_ORACLE_SEARCH_INDEX_ENABLED	Oracle Search Index for Journeys Enabled	Global Human Resources	Allocated Checklists
ORA_PER_CHK_ORACLE_SEARCH_DIRECT_INGEST_ENABLED	Direct Uptake of Data for Oracle Search in Journeys Enabled	Global Human Resources	Allocated Checklists

Run Initial Data Ingestion for the Required HCM Indexes

Run the HCM Access Control List Initial Ingestion process to create the search index. You won't need to run this process again after your quarterly updates because it automatically runs as needed. However, you must run the process on your target environment after every production-to-test (P2T) refresh.

1. Go to **Tools > Scheduled Processes** and select **Schedule New Process**.
2. Select **ESS Job to create index definition and perform initial ingest to OSCS** from the menu and click **OK**.
3. Set the parameter **Index Name to Reingest** and enter the index you want to ingest. For example:
 - o Set fa-hcm-person for the person index.
 - o If you're setting up multiple indexes for HCM products, then you must submit the process in a sequence with each index name as input parameter in serial. We recommended you submit indexes one by one to keep from loading up the Oracle Search Cloud Service (OSCS).
4. Launch the process for each HCM product deployed in your environment.

HCM Product	Index names
General search infrastructure	<ul style="list-style-type: none"> o fa-hcm-acl o fa-hcm-savedsearch
Global Human Resources	<ul style="list-style-type: none"> o fa-hcm-person

HCM Product	Index names
	<ul style="list-style-type: none">o fa-hcm-jobo fa-hcm-positiono fa-hcm-locationo fa-hcm-organization
Learning	<ul style="list-style-type: none">o fa-hcm-learningitemo fa-hcm-learn-aclo fa-hcm-learningrecordo fa-hcm-learningrecommendationo fa-hcm-learningbooking
Time and Labor	<ul style="list-style-type: none">o fa-hcm-timecard
Recruiting	<ul style="list-style-type: none">o fa-hcm-requisitiono fa-hcm-irc-hiring-events
Career and Profile Management	<ul style="list-style-type: none">o fa-hcm-modelprofileo fa-hcm-personprofile
Journeys	<ul style="list-style-type: none">o fa-hcm-workerjourneyo fa-hcm-workerjourneytask

Set up data security for Oracle Search

1. Go to **Tools > Scheduled Processes** and select **Schedule New Process**.
2. Submit this process to run only once:
 - o Compute Users ACL—For User Population All Users.
3. Schedule these processes to run:
 - a. Compute Users ACL by Event—Schedule for every 15-60 minutes.
 - b. Compute Users ACL—For User Population as Logged in users. Schedule for every 30-120 minutes.
 - c. Compute Users with Large ACL—For User Population as All Users and Compute action. Schedule to run once every day.

Set profile options for Redwood pages

Set the global and page-specific profile options.

Before you start

You must enable Oracle Search. See [Enable Oracle Search for Redwood](#)

Here's what to do

1. In Setup and Maintenance, search for and click the **Manage Administrator Profile Values** task.
2. Search for and select **ORA_HCM_VBCS_PWA_ENABLED** and set the profile value to Y.
Note: This global profile option enables Redwood across HCM applications.
3. Enable page-specific profile options. See [HCM Redwood Pages with Profile Options](#) (MOS Document 2922407.1).

Set security permissions for Redwood pages

For Redwood features, review the Access Requirements in [What's New](#), to view new or changed security privileges. These changes are also reflected in the [Security Reference for HCM](#) content.

If you use delivered job roles, new privileges are applied at every quarterly update. You don't need to do anything.

If you use custom job roles, you need to add the new privileges for each Redwood page that you adopt. For more information on editing custom roles, see [Edit Job Role and Abstract Role](#) in the Securing HCM content.

Contextual journey privileges

If you use the security roles delivered with our Oracle Cloud products, contextual journeys are ready to use.

If you use custom job roles, you must add these privileges to each custom Contingent Worker, Employee, and Pending Worker roles:

- Duty Privilege: ORA_PER_ACCESS_JOURNEY_BY_WORKER
- Aggregate Privilege: ORA_PER_REST_SERVICE_ACCESS_WORKER_JOURNEYS
- Function Privilege: PER_REST_SERVICE_ACCESS_WORKER_JOURNEYS

Related Topics

- [Edit the Role](#)
- [Security Reference for HCM](#)

Prepare Recruiting for Redwood

Schedule and submit each of these processes only once, in the order listed:

1. Go to **Tools > Scheduled Processes > Schedule New Process**.

2. Search for and select each of the following processes sequentially, submitting the next one after the previous one is complete. Run each process only once.
 - Load and Index Master Geography Hierarchy
 - Load and Index Job Requisitions
 - Load and Index Candidates

2 How do I convert my page personalizations?

Use the HCM Redwood Personalization Tool in Migrate and Report mode to convert your personalizations.

Note: If your personalization list isn't current, export it to the tool's working directory. See [Export your personalizations to the HCM Redwood Personalization Helper tool](#). Otherwise, use the CS_ADF_*.jar file that was created when you exported your personalizations.

After your Redwood pages are available in your test environment, you can use the personalization helper tool to convert your personalizations to a Visual Builder Studio workspace. Then, you import them to the Visual Builder instance in your test environment.

Export your Visual Builder Studio workspace to use with the HCM Redwood Personalization Helper tool

Complete these steps in the test environment associated with your Visual Builder Studio instance if you've created personalizations in your test environment. If you haven't created new personalizations, you can ignore this step.

Note: If you've created Visual Builder Studio Express personalizations in your test environment, you must export the workspace with the personalizations before running the Personalization Helper tool. If you don't export the workspace and include it while running the tool, when you import the converted personalizations back into the workspace, any existing personalizations in the environment will be overwritten.

1. In your test environment, open a Redwood page.
2. Select **Settings and Actions > Edit Page in Visual Builder Studio**, then select the Visual Builder Studio project with the personalizations you want to keep.
3. Select **Advanced** to move into Visual Builder Studio Advanced mode.
HCM supports Visual Builder Studio Express mode to personalize Redwood pages. Use Advanced mode only when importing or exporting a workspace.
4. Select **Export** from the menu.
5. Copy the downloaded folder to the same location where the HCM Redwood Personalization Helper .jar file is.

Run the HCM Redwood Personalization Helper tool

1. Launch the Personalization Helper tool.
2. Select your working directory.
3. Select the **Migrate and Report** mode.
4. Select the ADF Personalization File that you exported.

5. Select the Visual Builder Studio Workspace if you exported one to your working directory.
If you don't have an existing Visual Builder Studio workspace, the tool creates one for you.
6. Select the modules to convert.
7. If flexfields are used in your personalized pages, select **Include Flexfields** and enter the environment URL and user credentials.
The tool uses a REST API to retrieve flexfield metadata.
8. Submit the process.

Personalization Helper tool in migrate and report mode results

You'll find an output folder in the working directory with these files:

- Visual Builder Studio workspace: Includes converted personalizations to import into Visual Builder Studio Express. If you exported an existing workspace, the file will be called <original name of the VBS workspace>-updated.zip. If you didn't export a workspace, the tool creates and names a workspace for you.
- HTML output file: Lists the modules selected for processing, along with the related personalizations from Transaction Design Studio and Page Composer.
- XSLX output file: Lists all the modules (including personalization details) in the first two tabs. For each module, the tool creates a tab for Transaction Design Studio (TDS) and for Page Composer personalizations.

The report provides details on any personalizations that weren't migrated and what to do next.

Import converted personalizations to Visual Builder Studio

1. In your test environment, go to Visual Builder Studio and open the workspace you exported earlier to run the tool.
2. Select **Advanced** mode.
3. Select **Import** from the menu.
4. Import the workspace <original name of the VBS workspace>-updated.zip updated by the tool.
5. Select **Express** mode to view the imported personalizations in the Redwood pages.

3 How do I deploy Redwood to my production environment?

Once you validate the Redwood pages and flows in your test environment, you're ready to deploy to your production environment. You'll need to go through several, but not all the same steps you went through to prepare your test environment.

Prepare your production environment for Redwood

To update your production environment, you'll follow these same steps you completed in your test environment but now in your production environment.

- *Enable Oracle Search for Redwood*
- *Run Initial Data Ingestion for the Required HCM Indexes*
- *Set up data security for Oracle Search*
- *Set profile options for Redwood pages*
- *Set security permissions for Redwood pages*
- *Contextual journey privileges*
- *Prepare Recruiting for Redwood*

Move your tested personalizations to your production environment

The converted and validated personalizations in your test environment can be deployed to your production environment from Visual Builder Studio.

See *Set Up the Project to Deploy for Production* to set up a continuous integration and continuous delivery (CI/CD) pipeline. You can then use this pipeline to deploy your personalizations to production.

Note: You only need to set up this pipeline up once.

