Oracle

Project Portfolio Management Cloud

Implementing Project Execution Management

Release 12

This guide also applies to on-premises implementations

Oracle® Project Portfolio Management Cloud Implementing Project Execution Management

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Preface

This preface introduces information sources that can help you use the application.

Oracle Applications Help

Use the help icon to access Oracle Applications Help in the application. If you don't see any help icons on your page, click the Show Help icon in the global header. Not all pages have help icons. You can also access Oracle Applications Help at https://fusionhelp.oracle.com.

Using Applications Help

Watch: This video tutorial shows you how to find help and use help features.

Additional Resources

- **Community:** Use **Oracle Applications Customer Connect** to get information from experts at Oracle, the partner community, and other users.
- **Guides and Videos:** Go to the **Oracle Help Center** to find guides and videos.
- **Training:** Take courses on Oracle Cloud from **Oracle University** .

Documentation Accessibility

For information about Oracle's commitment to accessibility, see the **Oracle Accessibility Program** .

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.

1 Overview

Project Execution Management Offering: Overview

In the Project Management business process area, your enterprise can configure how you execute projects, including how to manage requirements, schedule and collaborate on tasks, staff resources, maximize utilization, resolve issues, and complete deliverables.

Before you begin, use the Setup and Maintenance work area to access reports for each offering, including full lists of setup tasks, the functional areas and features that you can select when you configure the offering, and business objects and enterprise applications that are associated with the offering.

The first implementation step is to configure the offerings in the Setup and Maintenance work area by selecting the offerings, functional areas, and features that you want to make available to implement.

The following functional areas, features, and feature choices are specific to the Project Execution Management offering.

Name	Description	Type	Choices
Initial Users	Perform the creation and management of users and manage security.	Functional Area	
Users and Security	Enable users to perform functions related to their job roles. Configure user access to HCM data and functions.	Functional Area	
Project Execution	Configure how you execute projects, manage requirements, schedule and collaborate on tasks, staff resources, maximize utilization, resolve issues, and complete deliverables. Define and manage project users, project roles, and calendars.	Functional Area	
Project Resource Management	Indicate whether Oracle Fusion Project Resource Management will be deployed.	Functional Area	
Application Extensions	Define approval routing structures and controls to match your organization's needs. Set up custom jobs using the Enterprise Scheduler Service configuration for Oracle Fusion Project Execution Management.	Functional Area	
Implementation Project Task Lists	Indicate whether to display the minimum or a complete list of	Feature	• **Basic**: Include the minimum number of setup tasks that

Name	Description	Type	Choices
	setup tasks in implementation projects.		must be implemented to use Project Execution Management applications. • **Complete**: Include all setup tasks to perform configuration tasks that are common to Oracle Fusion applications and to extend the functionality of Project Execution Management applications. For example, the Complete feature choice includes setup tasks for social networking, users and security, and application preferences.
Local Installation of Help	Define help settings if help is locally installed.	Feature	• Yes • No
Access to Internet-Based Help Features	Set options for using Internet-based help features.	Feature	• Yes • No
Help Customization	Set help options for privileged users to edit help and add custom help.	Feature	• Yes • No
Custom Help Security	Enables addition of links to internet sites from help, and sharing of ratings.	Feature	• Yes • No
Approval Administration	Define approval routing structure and controls to match your organization needs.	Feature	• Yes • No
Custom Job Scheduler	Setup custom jobs using enterprise scheduler service configuration.	Feature	• Yes • No

Optionally, create one or more implementation projects for the offerings, functional areas, and features that you want to implement first, which generates task lists for each project. The application implementation manager can customize the task list and assign and track each task.

If you select the **Complete** feature choice for the Implementation Project Task Lists feature, and enable all additional features, the generated task list for this offering will contain the groups of tasks listed in the following table.

Task List	Description
Define Common Applications Configuration for Project Execution Management	Define the configuration for common setup such as users, enterprise and HR structures, security, and common reference objects for Oracle Fusion Project Execution Management.

Task List	Description
	You can find other information that supports the common implementation tasks in the Oracle Applications Cloud Understanding Enterprise Structures guide.
Define Common Project Execution Options	Configure Oracle Fusion Project Management products to manage project users, project roles, and calendars.
Define Project Management Configuration	Configure Oracle Fusion Project Management to manage projects, tasks, requirements, deliverables, and resources, and to track and resolve issues.
Define Project Resource Management Configuration	Configure Oracle Fusion Project Resource Management to manage the availability and staffing of resources, fulfill project resource requests, and monitor resource utilization.
Define Extensions for Project Execution Management	Configure specific extensions for customization of Project Execution Management.

You can also customize and extend applications using other tools. For more information, see the Oracle Applications Cloud Customizing the Applications for Functional Administrators guide.

Common Implementation: Overview

Common implementation involves performing tasks that are common and apply to multiple offerings. The Define Common Applications Configuration, Define Transactional Business Intelligence, and Define Extensions task lists comprise these common setup and implementation tasks. You can search and access the common implementation task lists and tasks from the Setup and Maintenance work area.

Define Common Applications Configuration

Within an offering, you may find the Define Common Applications Configuration task list containing several tasks to manage common functional areas, for example:

- Setting up security, enterprise structures, geographies, and business units.
- Creating and maintaining user accounts and synchronizing the list of users and roles stored in Lightweight Directory Access Protocol (LDAP).

Define Transactional Business Intelligence

Use the Define Transactional Business Intelligence task list to configure business intelligence to gain real-time insight into transactional data. You can also secure the transactional data and manage the users accessing that data.

Define Extensions

Use the Define Extensions task list to configure offering-specific extensions to support customization of business objects. For example, the task list comprises tasks that help you to:

- Set options for the help features available at the site, which might include collaboration, access to external web sites, and settings for custom help content.
- Review and manage objects, for example currencies and reference data sets, that are shared across applications.
- Configure common reference objects such as flexfields, document sequences, and profile options that affect the functionality and look of Oracle Applications Cloud.

Understanding Implementation Structures

Setup and Maintenance: Overview

Oracle Functional Setup Manager enables rapid and efficient planning, configuration, implementation, deployment, and ongoing maintenance of Oracle Applications through self-service administration.

All Oracle Functional Setup Manager functionality is available from the Setup and Maintenance work area, which offers you the following benefits:

- **Self-Service Administration**:
  Manage all aspects of functional setup of Oracle Fusion applications at the business user level with an integrated, guided process for planning, configuration, implementation, deployment, and maintenance.
- **Configurable and Extensible**:
  Configure and Extend prepackaged list of tasks for setting up Oracle Fusion applications to better fit your business requirements.
- **Complete Transparency**:
  Get full visibility of Oracle Fusion applications end-to-end setup requirements with auto-generated, sequential task lists that include prerequisites and address dependencies.
- **Prepackaged Lists of Implementation Tasks**:
  Task lists can be easily configured and extended to better fit with business requirements. Autogenerated, sequential task lists include prerequisites and address dependencies to give full visibility to end-to-end setup requirements of Oracle Applications.
- **Rapid Start**:
  Specific implementations can become templates to facilitate reuse and rapid-start for comparable Oracle Applications across many instances.
- **Comprehensive Reporting**:
  A set of built-in reports helps to analyze, validate and audit configurations, implementations, and setup data of Oracle Applications.

With Oracle Functional Setup Manager you can:

- Learn about and analyze implementation requirements.
- Configure Oracle Applications to match your business needs.
- Achieve complete visibility to set up requirements through guided, sequential task lists downloadable into Excel for project planning.
- Enter setup data through easy-to-use user interfaces available directly from the task lists.
- Export and import data from one instance to another for rapid setup.
- Validate setup by reviewing setup data reports.
- Implement all Oracle Applications through a standard and consistent process.

Offerings: Explained

Offerings are application solution sets representing one or more business processes and activities that you typically provision and implement as a unit. They are, therefore, the primary drivers of functional setup of Oracle Fusion applications. Some of the examples of offerings are Financials, Procurement, Sales, Marketing, Order Orchestration, and Workforce Deployment. An offering is the highest level grouping of Oracle Fusion Applications functionality. They include functional areas, and alternative business rules known as features.

Functional Areas: Explained

A functional area is a grouping of functionality within an offering. It may be an optional piece of functionality that you may want to implement as part of an offering. Optional functional areas can be included or excluded from their parent offering. Functional areas may be hierarchical, and therefore may be subordinate to another functional area. An offering has at least one base or core functional area and may have one or more optional functional areas. Additionally, one or more or features may be associated to an offering. Base functional areas indicate the core functionality that you need to implement for the offering to be operational.Optional functional areas indicate optional functionality that you may or may not implement for an offering.

Common Functional Areas

Some core functionality essential to an offering such as setting the Initial Users or the Legal Structures may be shared across offerings. These are known as common functional areas and appear across offerings. Although most of the tasks associated to a common functional area are the same regardless of the offering you implement, there may be some offering-specific tasks.

In general once you implement a common functional area for a given offering, you won't need to repeat its implementation for the remaining offerings, however, it's recommended you check if there is any offering specific tasks that may still require your attention.

Base and Optional Functional Areas

Functional areas that support core functionality for an offering are known as base functional areas and must be implemented in order for the offering to be operational. Other functional areas known as optional functional areas support processes or functionality that can be implemented at your discretion depending on the business requirements. These can be implemented later during the implementation process.

Features: Explained

Offerings include optional or alternative business rules or methods called feature choices, used to fine-tune business processes and activities supported by an offering or a functional area. You make feature selections according to your business requirements to get the best fit with the offering. If the selected offerings and functional areas have dependent features then those features are applicable when you implement the corresponding offering or functional area.

Feature choices can be one of three different types:

Yes or No

If a feature can either be applicable or not be applicable to an implementation, a single check box is presented for selection. Check or deselect to specify yes or no respectively.

Single Select

If a feature has multiple choices but only one can be applicable to an implementation, multiple choices are presented as radio buttons. You can turn on only one of those choices.

Multi-Select

If the feature has multiple choices but one or more can be applicable to an implementation then all choices are presented with a check box. Select all that apply by checking the appropriate choices.

Implementation Task Lists: Explained

The configuration of the offerings determine how the list of setup tasks is generated during the implementation phase. Only the setup tasks needed to implement the selected offerings, functional areas and features are included in the task list. This gives you the targeted task list necessary to meet your implementation requirements.

Managing an Implementation

Enabling Offerings: Explained

When planning your implementation, you decide what business processes your organization or company performs or supports. These decisions determine the offerings and functional areas you want to implement. You then configure the offerings and functional areas that support the activities your organization or company performs. During the configuration process, you specifically enable offerings and functional areas for use before you implement them.

Enabling Offerings and Functional Areas

Use the Setup and Maintenance work area to help decide which offerings to enable for implementation. Once you decide to use an offering, you can select the Configure button to choose the configuration details and enable the offering, associated functional areas, and features. All the base functional areas of an offering are automatically enabled for implementation when you enable the parent offering. You choose which optional functional areas to enable. The functional areas appear in an expandable and collapsible hierarchy to facilitate progressive decision making for implementation.

Enabling Features

Features are optional or alternative business rules or methods used to fine-tune business processes and activities supported by an offering or a functional area. If features are available for the offering or functional areas, you can enable them to help meet your business requirements, if desired. In general, the features are set with a default configuration based on their typical usage in most implementations. You should always review the available features for the offering and functional areas and select them as appropriate. Dependent features appear visible when the feature choice they depend on is selected for implementation.

Enabling Offerings: Procedure

You enable offerings to customize the functionality that matches the services you plan on implementing.

Enabling Offerings

To enable offerings, follow these steps.

1. Open the Setup and Maintenance work area **(Navigator > Setup and Maintenance)**.
2. In the Setup and Maintenance Offerings page, select the offering you're using, then click **Configure**.
3. In the Configure page, select the **Enable** check box for the offering. Also select the **Enable** check box for each of the functional areas you want to use.
4. Click the Features icon for the offering or functional area you have enabled, then enable any features you require. Select **Done** when complete.
5. Select **Done** to return to the Offerings page then repeat the same steps for each of the offerings you are using.

Implementing Offerings: Explained

Once you have configured the offering you want to implement, you can start performing the appropriate task to setting your applications up to support your business processes. Functional Setup Manager provides two methods to set up the offerings and therefore applications depending on your business needs.

Offering based implementation

Following a predefined list of tasks required for the features you selected to implement. This method enables you to implement the functionality on an adopt-as-you-go based approach. It provides you direct access to the setup tasks saving you time as by default gives you visibility to the minimum requirements for your implementation. This is always the recommended method to implement your applications unless you require custom implementation task lists.

Project based implementation

Enables you to customize your implementation defining an implementation project with a tailored list of tasks, task assignment and implementation progress monitoring. Use of this method is recommended when you require a custom task list.

Offering Based Implementation: Explained

You can use the Setup and Maintenance work area to directly implement an entire offering or functional areas within an offering. You do not need to create an implementation project, and instead use a modular approach to your implementation.

You can complete setup of specific business areas quickly to start transactions, and then gradually adopt more and more application functionality as needed.

An offering or functional area-based approach means you set up various parts of an offering at different times. You can start with set up of the functional areas that you immediately need to adopt. Over time, you can continue to set up other functional areas as you start to adopt additional applications functionality. Offerings must be enabled for implementation in order for their functional areas to display. Offering or functional area-based implementation provides the following advantages:

- When you select an offering the relevant functional areas appear for selection. The common functional areas are those shared across offerings and are listed first. The functional areas that are only associated with the selected offering, are at the bottom of the list.
- A functional area usually has several setup tasks, but only a few of them require input before the application function is ready for transactions. The rest of the setup tasks are usually optional or have predefined default values based on common use cases. When you select a functional area for implementation, you can view just the required tasks, or you can view the full list of setup tasks for the functional area.

Executing Setup Tasks

You select the functional area you want to implement and the list of tasks that you need to perform appears. The tasks are organized with prerequisites and dependencies in mind. Select the task for which you want to enter data and then click Go to Task to render the page where you perform the task. If the setup data entered through a task can be segmented by a specific attribute, and therefore could be performed iteratively for each qualifying value, then the task may benefit from scope. Typical examples include tasks relevant to legal entities, business units, ledgers, tax regimes, and legislative data roles. For such tasks, you are prompted to pick a scope value before entering data. You can pick a scope value that was previously selected, select a new scope value, or create a new scope value and then select it. The selected value is a qualifying attribute of the setup data entered by way of the task, and therefore, different setup data can be entered for different scope values. Enter data as appropriate and once you finish, close the page and you return to the functional area list of tasks.

Note: You cannot perform a task if you do not have the proper security entitlement.

Project Based Implementation: Explained

You can create implementation projects to manage the implementation of an offering and functional areas as a unit throughout the implementation life cycle, or maintain the setup of specific business processes and activities customizing the list of tasks to complete their implementation.

An implementation project is the list of setup tasks you need to complete to implement selected offerings and functional areas. You create a project either by:

- selecting an offering and its functional areas you want to implement together, then customize the list of tasks for such offering and functional areas as applicable.
- selecting specific setup task lists and tasks you require for a specific configuration.

You can also assign these tasks to users and track their completion using the included project management tools.

Selecting Offerings

When creating an implementation project you see the list of offerings and functional areas that are configured for implementation. Implementation managers specify which of those offerings and functional areas to include in an implementation project. It is strongly recommended that you limit your selection to one offering per implementation project, even though the application does not prevent you from including more than one. The implementation manager should decide based on how they plan to manage their implementations. For example, if you implement and deploy different offerings at different times, then having separate implementation projects help to manage the implementation life cycles. Furthermore, the more offerings you included in an implementation project, the bigger the generated task list is. This is because the implementation task list includes all setup tasks needed to implement all included offerings. Alternatively, segmenting into multiple implementation projects makes the process easier to manage and ensures that import and export sequence of the project data is straightforward in the correct sequence.

Why can't I see the tasks for my offerings in the panel tab?

Set the implementation status of your offerings to **In Progress** or **Implemented** using the **Change Configuration** action from the Administration section of the Setup and Maintenance work area to view the tasks for your offerings.

2 Common Applications Configuration: Overview

Define Common Applications Configuration for Project Execution Management: Overview

In the Define Common Applications Configuration for Project Execution Management activity, you perform common setup steps such as populating the product tables containing user and role information and defining security for Project Execution Management applications. This activity contains advanced setup tasks that aren't required for a typical implementation of Project Execution Management applications.

Setup tasks in the Define Common Applications Configuration for Project Execution Management activity are grouped into the following task lists:

Task List	Description
Define Synchronization of Users and Roles from LDAP	Run a process to populate the product tables containing user and role information with the users and roles held in LDAP. This process is typically the first implementation task but can also run periodically to keep the product tables synchronized with subsequent updates to LDAP.
Define Security Synchronization Processes and Preferences	Enable users to set up applications security synchronization processes and preferences.
Define Security for Project Execution Management	Enable users to perform functions related to their job roles.

3 Common Applications Configuration: Define Synchronization of Users and Roles from LDAP

User and Role Synchronization: Explained

User accounts for users of Oracle Fusion Applications are maintained in your Lightweight Directory Access Protocol (LDAP) directory. The LDAP directory also holds information about roles provisioned to users.

During implementation, any existing information about users and their roles must be copied from the LDAP directory to the Oracle Fusion Applications tables. To copy this information, you use the task Run User and Roles Synchronization Process. This task calls the Retrieve Latest LDAP Changes process. You can perform the task Run User and Roles Synchronization Process from either an implementation project or the Setup and Maintenance work area.

Once the Oracle Fusion Applications tables are initialized with this information, it's maintained automatically.

4 Common Applications Configuration: Define Security and Users

Define Security: Overview

Oracle Enterprise Resource Planning Cloud (Oracle ERP Cloud) and Oracle Supply Chain Management Cloud (Oracle SCM Cloud) are secure as delivered; they limit access to one initial setup user. To enable application users to access application functions and data, you perform tasks in these task lists, as appropriate:

- Define Security for Financials
- Define Security for Procurement
- Define Users and Security for Product Management
- Define Security for Project Execution Management
- Define Security for Project Financial Management
- Define Security for Supply Chain Management

This topic introduces the tasks in these task lists. For more information on ERP and SCM security setup and task instructions, see these guides:

- Oracle Enterprise Resource Planning Cloud: Securing Oracle ERP Cloud.
- Oracle Supply Chain Management Cloud: Securing Oracle SCM Cloud.

Note: You can perform most tasks in these task lists both during implementation, and later as requirements emerge.

Manage Job Roles

The Oracle ERP Cloud and Oracle SCM Cloud security reference implementations provide many predefined job roles. You can perform the Manage Job Roles task to:

- Review the role hierarchy and other properties of a job or abstract role.
- Create custom job and abstract roles.
- View the roles assigned to a user.
- View the users who have a specific role.

A user with the IT Security Manager or Application Implementation Consultant job role performs the Manage Job Roles task.

Manage Duties

The Oracle ERP Cloud and Oracle SCM Cloud security reference implementations provide many predefined duty roles. You can perform the Manage Duties task to:

- Review the duties of a job or abstract role.
- Manage the duties of a custom job or abstract role.
- Create custom duty roles.

A user with the IT Security Manager job role performs the Manage Duties task.

Define Data Security

You can manage Oracle ERP Cloud and Oracle SCM Cloud application data by performing tasks in these task lists:

- Define Data Security for Financials
- Define Data Security for Procurement
- Define Data Security for Product Management
- Define Data Security for Project Financial Management
- Define Data Security for Supply Chain Management

You can perform the tasks in these task lists to:

- Manage data access sets that secure ledgers.
- Manage Human Capital Management (HCM) security profiles that facilitate data role assignment for application users.
- Manage data security policies that determine grants of entitlement to a user or role on an object or attribute group.

A user with the IT Security Manager job role performs the tasks in the Define Data Security task lists.

Manage Role Provisioning Rules

You create role mappings to control the provisioning of all types of roles to application users by performing this task. For example, you can create a role mapping to provision the Accounts Payable Specialist role automatically to users that meet criteria specific to accounts payable users.

A user with the IT Security Manager job role performs the Manage Role Provisioning Rules task.

Manage Oracle Social Network Objects

You can determine which business objects in Oracle ERP Cloud are available for social collaboration by performing this task. For example, use this task to enable discussion among Oracle Social Network users about requisitions, purchase orders, invoices, payments, receipts, and other transactions.

A user with the IT Security Manager or Application Implementation Consultant job role performs the Manage Oracle Social Network Objects task.

Note: You can perform this task after you set up and configure Oracle Social Network. If you do not use Oracle Social Network, you can skip this task.

Define Users

Define Implementation Users: Overview

Implementation users perform the setup tasks in Oracle Enterprise Resource Planning (ERP) Cloud and Oracle Supply Chain Management (SCM) Cloud implementation projects. This topic introduces the tasks in the Define Implementation Users task list. You can find more information about implementation users and tasks they perform in the product specific implementation and security guides for your offering.

Create Implementation Users

You must have at least one implementation user. To ensure segregation of critical duties, multiple implementation users are recommended. For example, one implementation user typically performs functional setup tasks and another performs security setup tasks. When you create implementation users, you also assign predefined job roles to them directly. The job roles vary with the tasks that the implementation users perform.

The cloud service administrator creates implementation users.

Related Topics

- Implementation Users: Explained

5 Define Common Project Execution Options

Define Common Project Execution Options: Overview

In the Define Common Project Execution Options activity, you perform setup steps such as creating the project application administrator, project users, and roles, defining calendars, and creating project enterprise resources.

Setup tasks in the Define Common Project Execution Options activity are grouped into the following tasks and task lists.

Task or Task List	Description
Manage Project Implementation Administrator	Create or identify a project application administrator to manage and control access to Oracle Fusion Project Management applications.
Manage Project User Provisioning	Create and update project users and assign enterprise roles, such as Project Execution and Team Collaborator, to provide access to Oracle Fusion Project Portfolio Management applications.
Manage Project Management Roles	Create and update roles that are used to control access to project-level information and for defining project resource requests.
Define Project and Resource Calendars	Define calendars to assign to projects and resources to establish work schedules.
Manage Project Enterprise Resources	Create and update enterprise resources to assign to projects, tasks, issues, and deliverables.

Manage Project User Provisioning

Provisioning Access to Project Execution Management Applications: Overview

Use the Manage Project User Provisioning page to request user accounts and assign job or abstract roles for project enterprise labor resources. This action enables resources to sign into Project Execution Management applications to plan projects, manage resources, review, track, and collaborate on work.

You can also request user accounts and assign job or abstract roles when you create or edit resources on the Manage Project Enterprise Resources page.

During implementation you can provision a set of users and assign the Project Application Administrator role so that these administrators can initiate the provisioning process for the rest of the project enterprise labor resources.

Resources to Provision

A resource that you provision typically falls into one of these categories:

- Resource is an employee or contingent worker in Oracle Fusion HCM and is a project enterprise labor resource in Oracle Fusion Project Management.

  User accounts for these resources are typically created in Oracle Fusion HCM. You can associate the employee or contingent worker with a project enterprise labor resource and assign project-related roles when you create the resource in Oracle Fusion Project Management.

  > **Note:** You can't create a user account in Oracle Fusion Project Management for an existing HCM employee or contingent worker. HCM persons are registered in Oracle Fusion HCM.

- Resource is a project enterprise labor resource in Oracle Fusion Project Management, but isn't an HCM employee or contingent worker.

  You can maintain resource details and add resources to projects even if the resources aren't HCM employees or contingent workers. Create user accounts to register the resources in the identity management system, and assign project-related roles to the resources.

- Resource is an HCM employee or contingent worker, but isn't a project enterprise labor resource in Oracle Fusion Project Management.

  You can assign project-related roles to resources who have user accounts that were created in Oracle Fusion HCM. However, you must create the resources in Oracle Fusion Project Management before you can assign them to projects, or before the resources can open project or resource management pages in the application.

Job or Abstract Roles

You can provision the following predefined job or abstract roles to resources:

- **Project Application Administrator**: Collaborates with project application users to maintain consistent project application configuration, rules, and access.
- **Project Execution**: Manages projects in Project Execution Management applications. Manages issues, deliverables, changes, and the calendar.
- **Resource Manager**: Manages a group of project enterprise labor resources. Monitors the utilization of resources and manages the assignment of resources to work on projects. Collaborates with project managers to find suitable resources to fulfill project resources requests.
- **Team Collaborator**: Performs, tracks, and reports progress on project and nonproject work. Collaborates with other team members or project managers to perform project tasks and to-do tasks. Manages issues, deliverables, changes, and the calendar.
- **Project Executive**: Establishes key performance indicators and other project performance criteria for a business area or organization. Manages business area performance. Owns profit and loss results for an organization, service line, or region.

In addition, you can provision custom job roles for resources. For example, you can provision a Custom Team Member role that contains a different set of security permissions than the Project Team Member role.

Default Role Assignments

You can select project-related predefined and custom roles to provision by default. The application assigns the default roles to project enterprise labor resources that you create using any of the following methods:

- Import Project Enterprise Resource process for Oracle Cloud
- Project Enterprise Resource External Service
- Import HCM Persons as Project Enterprise Resources process
- Export Resources and Rates process that moves resources from the planning resource breakdown structure in Project Financial Management applications to Oracle Fusion Project Management
- Maintain Project Enterprise Labor Resources process in Oracle Fusion Project Resource Management

Go to the **Manage Project User Provisioning page - - Default Provisioning Attributes tab - - Default Role Assignments section** to select the default roles. Then select the option to **Automatically provision roles when mass creating project enterprise labor resources**.

Project User Account and Role Provisioning Statuses: Explained

This topic describes project user account and role provisioning statuses in Project Execution Management applications.

Project User Account Statuses

The user account status indicates whether a project enterprise labor resource can access Project Execution Management applications based on assigned roles. The following table lists the project user account statuses.

User Account Status	Description
Active	The user is active and can access the application. A project user account is active for a resource in either of these scenarios: • You create a user account for the resource in Oracle Fusion Project Management. • The resource is an employee or contingent worker with an active account in Oracle Fusion Human Capital Management (HCM).
Inactive	The user is inactive and cannot access the application. A project user account is inactive for a resource in either of these scenarios: • The resource is an employee or contingent worker who is no longer active in HCM, such as when the employee is terminated. • The resource isn't an employee or contingent worker and you disable the resource in the identity management system.

Role Provisioning Statuses

When you create a user account in Oracle Fusion Project Management and assign project job or abstract roles to the resource, the application sends a provisioning request to the identity management system. The role provisioning status indicates the processing status of the request. The following table lists the role provisioning statuses.

Role Provisioning Status	Description
Requested	Role provisioning is requested for a resource.
Completed	Role provisioning completed without errors or warnings.
Failed	Role provisioning failed because of errors or warnings.
Partially completed	Role provisioning is partially complete.
Pending	Role provisioning is in progress.
Provisioned	The role is provisioned in the identity management system.
Rejected	The role provisioning request is rejected by the identity management system.
Suppressed	Status used in HCM for user accounts aren't created automatically.

You can view project user account and role provisioning statuses on the Manage Project User Provisioning page and Manage Project Enterprise Resources page.

Provisioning Project Resources on the Manage Project User Provisioning Page: Procedure

Use the Manage Project User Provisioning page to create and update project users, request user accounts, and assign job or abstract roles to resources. This action enables resources to sign into Project Execution Management applications to plan projects, manage resources, and review, track, and collaborate on work.

Creating and Provisioning a User

Perform these steps to create a project user, request a user account, and provision roles on the Manage Project User Provisioning page.

1. Navigate to the Setup and Maintenance work area and search for the Manage Project User Provisioning task.
2. On the Search page, click the Manage Project User Provisioning link to open the **Manage Project User Provisioning page - User Provisioning tab**.
3. Click the **Create** icon to open the Create Project User window.
4. Enter the required fields and click the **Request user account** option.

   When you select the **Request user account** option, the roles that you specified to provision by default appear in the Role Details table for the resource.
5. Select the **Assign administrator role** option to assign the Project Application Administrator role to the resource.

   This action adds the Project Application Administrator role to the Role Details table.
6. Add predefined or custom roles to the Role Details table, as needed. The predefined roles are:

Role	Description
Project Application Administrator	Collaborates with project application users to maintain consistent project application configuration, rules, and access.
Project Execution	Manages projects in project management applications and is not assigned the project manager job role. Manages issues, deliverables, changes, and the calendar.
Resource Manager	Performs functions in Oracle Fusion Project Resource Management.
Team Collaborator	Performs, tracks, and reports progress on project and nonproject work. Manages issues, deliverables, changes, and the calendar.
Project Executive	Establishes key performance indicators and other project performance criteria for a business area or organization. Manages business area performance. Owns profit and loss results for an organization, service line, or region.

> **Tip:** The Team Collaborator and Project Execution roles appear in the Role Details table by default. You can change the default roles on the **Manage Project User Provisioning page - Default Provisioning Attributes tab**.

7. Click **Save and Create Another** or **Save and Close**.

   This action:

   - Sends a request for a user account to the identity management system
   - Sends the resource an e-mail notification when the provisioning process is successful

Additional points to consider:

- You can add or remove roles for a resource with an existing user account. Use the **Edit** feature to add roles. Use the **Actions** menu to remove roles.

  > **Note:** You must wait until the previous provisioning request is complete for a resource before you add or remove roles for the resource.

- Use the **Assign Resource as Project Manager** action in the Search Results region to add a resource to a project as a project manager. When you add a project manager with the **Assign Resource as Project Manager** action, the application provisions the Project Execution role for the resource.
- Click the link in the **Last Request Status** column to view the details of the most recent provisioning action for a resource.
- On the **Manage Project User Provisioning page - Default Provisioning Attributes tab**, you can:
  - Select project-related predefined and custom roles to provision by default when you create project users.
  - Select the **Automatically provision roles when mass creating project enterprise labor resources** option to assign the default roles when creating users with import processes and services for employees and contingent workers.

Provisioning Project Resources on the Manage Project Enterprise Resources Page: Explained

You can provision a resource on the Manage Project Enterprise Resources page when you create or edit a resource who is not an employee or contingent worker in Oracle Fusion Human Capital Management.

Provisioning a Resource

You can request a user account from the Create Project Enterprise Resource window or Edit Project Enterprise Resource window.

- On the Create Project Enterprise Resource window, select the **Request user account** option.
- On the Edit Project Enterprise Resource window, click **Activate User Account**.

When you request a user account from the Create or Edit Project Enterprise Resource window, the application:

- Provisions the default role assignments for the resource
- Sends a request for a user account to the identity management system
- Sends the resource an e-mail notification when the provisioning process is successful

Click the link in the **User Account Status** column to view the role provisioning status of the most recent provisioning action for a resource.

Assigning a Resource as a Project Manager from the Manage Project User Provisioning Page: Explained

A project application administrator can use the **Assign Resource as Project Manager** action in the **Manage Project User Provisioning page - Search Results region** to add a resource to a project as a project manager. For example, assume that a project team member takes over the project manager responsibilities while the manager is away on leave. The administrator can add the team member as a project manager and provision the Project Execution role for the team member.

When the administrator adds the resource as a project manager:

- If the resource is an existing project user, doesn't have a pending provisioning request, and doesn't have the Project Execution role, then role provisioning is requested to assign the Project Execution role to the resource. The resource is added to the project as a project manager with a Planned assignment status.
- If the resource is an existing project user with the Project Execution role, then the resource is added to the project as a project manager and no provisioning occurs.
- If a resource isn't an existing project user, or if a resource has a pending provisioning request, then you can't assign the resource as a project manager from the Manage Project User Provisioning page.

FAQs for Manage Project User Provisioning

Why can't I view project management or resource management pages?

To view project management or resource management pages, you must be a project enterprise labor resource with an active user account. In addition, you must have a job or abstract role with the security privilege to access specific pages in Project Execution Management applications.

For more information, refer to the Securing Project Execution Management Applications section in the Implementing Project Portfolio Management Security: Overview topic.

Related Topics

- Implementing Project Portfolio Management Security: Overview

Manage Project Management Roles

Project Roles in Project Execution Management Applications: Explained

A project role is a classification of the relationship that a person has to a project, such as project manager, functional consultant, or technical lead.

Following are examples of predefined project roles that you can't edit or delete:

- Project manager
- Project team member
- Staffing owner

You can create additional project roles to meet the needs of your organization. However, you can't delete a project role that's designated as a resource's primary project role, specified on a project resource request, or assigned to a resource on a project.

Use project roles for the following purposes:

- To identify the type of work that a person performs on project assignments
- To set up default resource qualifications
- As criteria when searching for resources to fulfill project resource requests
- As a resource's primary project role
- To allow access to project management information for project managers

Project Assignments

You select a project role when you add a resource to a project. The primary project role for a project enterprise resource is the default project role when you add the resource to the Manage Project Resources page.

When you fulfill a project resource request in the Project Resources work area and create an assignment for the resource, the project role specified on the request is the default project role on the assignment. You can change the project role on the Confirm Resource for Assignment or Reserve Resource for Assignment page before you submit the assignment for approval.

Default Resource Qualifications

On the Manage Project Roles page, select a set of default qualifications, proficiencies, and keywords for each project role. Default qualifications, proficiencies, and keywords that you associate with a project role automatically appear as requirements on a project resource request when you select the project role for the request.

Project Resource Requests

When searching for resources to fulfill a project resource request on the Search and Evaluate Resources page, you can filter the resource search results by the resource's primary project role to focus the results.

Primary Project Roles

You can designate a primary project role for a resource that represents the work that the resource typically performs on project assignments.

You can use the resource's primary project role in the following areas in Oracle Fusion Project Resource Management:

- As a resource search option filter when viewing resources on the Search and Evaluate Resources page
- When viewing resource information on the Resource Details page
- When comparing the attributes of multiple resources against the requirements specified in the project resource request on the Compare Resources page
- As an attribute value to assign to new resources that the Maintain Project Enterprise Labor Resources process creates
- As search criteria when searching for a project enterprise labor resource to designate as a resource pool owner on the Manage Resource Pools page
- As advanced search criteria when searching for resource pool members on the Manage Resource Pools page
- When sorting open project resource requests on the Resource Manager Dashboard

Creating Project Management Roles: Procedure

You can set up specific roles and associate qualifications and keywords to each role. When a project manager requests a resource to fulfill this role on a project, the qualifications and keywords appear on the project resource request.

> **Note:** Project manager and project team member are two predefined project roles that you can't edit or delete as they have specific functions in a project.

Creating a Role

1. Open the Setup and Maintenance work area, and search for the **Manage Project Management Roles** task.
2. Click the **Manage Project Management Roles** link.
3. On the Manage Project Roles page, click the **New** icon.
4. Enter a name for the role and click **Save**.
5. Click the **Show More** link.
6. In the Default Qualifications and Keywords section, click the **New** icon to add qualification and keywords for the role created.

7. Click **Save and Close**.

Define Project and Resource Calendars

Project and Resource Calendars: Explained

Project and resource calendars define the standard working and nonworking time for projects and resources. Working times are the days and total hours in a calendar during which work can occur. Nonworking times in a calendar are days and total hours for which work shouldn't be scheduled, such as weekends and holidays.

> **Note:** In Oracle Fusion Project Management and Oracle Fusion Project Resource Management, you can select only the Elapsed schedule type to use in project and resource calendars.

Features of project and resource calendars include:

- Default calendars
- Project calendars
- Resource calendars
- Standard calendar

Default Calendars

Your implementation team selects a default project calendar and resource calendar on the **Define Project Management Implementation Options** page. The default project calendar is automatically assigned to new projects, and the default resource calendar is automatically assigned to new project enterprise labor resources.

If the default project calendar doesn't meet the schedule requirements for a specific project, a project manager can select another calendar during project creation. Similarly, if the default resource calendar doesn't meet the scheduling requirements for a specific project enterprise labor resource, the project application administrator can assign another calendar to the resource.

Project Calendars

A project manager can select the calendar for a project during project creation or when managing the project plan. The working days and total hours in the calendar are used to schedule the project plan. The calendar also works with the project start and finish dates to determine the project duration.

If required, associate a schedule exception with the selected calendar for the project plan. If you create an off period exception, then the exception overrides any nonworking days and makes them working days. If you create a work period exception, then the exception overrides any working days and makes them nonworking days. The project plan uses the schedule exceptions for calculating dates or duration.

Create a schedule exception using the Manage Project Schedule Exceptions task and associate the exception to the project calendar using the Manage Project Schedules task in the Setup and Maintenance work area.

Resource Calendars

The project application administrator can select a resource calendar when creating or editing a project enterprise resource. The working days and total working hours in a resource calendar are used to determine resource availability.

Oracle Fusion Project Resource Management uses the resource calendar to determine a resource's available hours for a project. The Update Resource Utilization Data process calculates the resource's projected utilization with the available hours.

Standard Calendar

Oracle Fusion Project Execution Management provides a standard calendar of 8 hours per day, 5 days per week that you can assign to projects and resources.

Related Topics

- What's the difference between project calendars and resource calendars?

Creating Calendars for Projects and Resources: Procedure

You can create the elements that represent project schedules, which are used to define the project and resource calendars. Project and resource calendars define the standard working and nonworking time for projects and resources. Working times are the days and total hours in a calendar during which work can occur. Nonworking times in a calendar are days and total hours for which work should not be scheduled, such as weekends and holidays.

Calendar definition is shared across Oracle Fusion Applications. Project Execution Management applications provide a standard calendar of 8 hours per day, 5 days per week that you can assign to projects and resources.

In Oracle Fusion Project Resource Management, available capacity is calculated only for active project and resource calendars with a schedule type of Elapsed, one workday pattern of 7 days, and one project shift. In Oracle Fusion Project Management and Oracle Fusion Project Resource Management, you can select only the Elapsed schedule type to use in project and resource calendars.

Schedules are used as a base for project and resource calendars in Project Execution Management applications. The smallest scheduling unit is a day. For example, you can define the number of hours in a day but, you can't schedule work for a specific time of the day. The following are the elements of a schedule:

- Shifts
- Workday patterns
- Exceptions

Managing Shifts

A shift is a period of time, typically expressed in hours, that can be defined by a start and end time, or duration. Multiple shifts per day are not supported in Project Execution Management.

1. Open the Setup and Maintenance work area, and go to the **Manage Project Shifts** task.
2. Click the **Manage Project Shifts** link.
3. On the Manage Shifts page, click the **Create Shift** list.
4. Select **Create Elapsed Shift** from the list.
5. Enter name and duration for the selected shift and click **Save and Close**.
6. Click **Done**.

Managing Workday Patterns

A workday pattern is a collection of one or more shifts for a specific number of days. A pattern repeats itself for a date range to define the complete schedule.

1. Open the Setup and Maintenance work area, and go to the **Manage Project Workday Patterns** task.
2. Click the **Manage Project Workday Patterns** link.

3. On the Manage Workday Patterns page, click the **Create Workday Pattern** list.
4. Select **Create Elapsed Workday Pattern** from the list.
5. Enter name and days for the pattern. For example, if a workday pattern is a week, define the work pattern as 7 days.
6. In the Workday Pattern Details section, click the **Add Row** icon and enter the shift details. Note that if work is carried out on certain days of the week, for instance Monday to Friday, then work day pattern details will only be from day 1 through day 5.
7. Click **Save and Close**.
8. Click **Done**.

Managing Exceptions

Exceptions are deviations from a schedule. An example of a schedule exception is a public holiday falling on an otherwise working day or special working days created for normal nonworking days such as weekends.

1. Open the Setup and Maintenance work area, and go to the **Manage Project Schedule Exceptions** task.
2. Click the **Manage Project Schedule Exceptions** link.
3. On the Manage Schedule Exceptions page, click the **Create Schedule Exception** icon.
4. Enter the details for the exception and click **Save and Close**.
5. Click **Done**.

Managing Schedules

Schedules contain workday patterns and exceptions.

1. Open the Setup and Maintenance work area, and go to the **Manage Project Schedules** task.
2. Click the **Manage Project Schedules** link.
3. On the Manage Schedules page, click the **Create Schedule** list.
4. Select **Create Elapsed Schedule** from the list.
5. Enter the name and date range for the schedule. The start date of the schedule determines day 1 of the work pattern. For example, if you pick Monday, December 28, 2015 as the effective from date, then day 1 is a Monday. If you pick Friday, January 1, 2016 as the effective from date, then day 1 is a Friday.
6. In the Schedule Details section, enter details in each tab as applicable.
7. Click **Save and Close**.
8. Click **Done**.

FAQs for Define Project and Resource Calendars

What happens if project resource request dates are outside the resource calendar effective dates?

The application can't calculate a resource's available capacity if the project resource request dates are outside of the resource calendar effective dates. The resource will have no Available Capacity score.

Manage Project Enterprise Resources

Project Enterprise Labor Resource Components: How They Work Together

A project enterprise labor resource is a resource that you can assign to multiple projects. If you manage resource availability and staffing in Oracle Fusion Project Resource Management, use project enterprise labor resources to fulfill project resource requests.

Consider the following attributes and options when creating a resource in the Create Project Enterprise Resources window.

- Resource details
- Personal details
- Resource Management details
- Rate details

Resource Details

Resource details include the following attributes:

- **Type**

  You can create both labor and expense type resources to add to a project.

  Select the **Create from expenditure type** option to create an expense resource from an expenditure type in Project Financial Management.
- **Create From HCM Person**

  Select this option to create a project enterprise labor resource from an employee or contingent worker in Oracle Fusion HCM.

  > **Note:** The employee or contingent worker must have a unique e-mail in a valid format and an active primary assignment in HCM.

- **From Date** and **To Date**

  The resource's **From Date** is the date from which you can assign the resource to a project. The **To Date** is the last date that you can assign the resource to a project.
- **Request User Account** and **Provision Project Roles**

  Select these options to request a user account for a new resource and provision the resource with default role assignments. You can request a user account only for a resource who isn't associated with an employee or contingent worker in HCM.

  Click **Activate User Account** to request a user account for an existing resource. This action provisions the default role assignments for the resource and sends the resource an e-mail notification.

Personal Details

Personal details include the following attributes:

- **Calendar**

Resource calendars are used to:

- Determine resource availability
- Schedule tasks
- Assign resources to tasks
- Calculate cost and bill amounts based on hourly rates

Daily work on a resource's calendar is measured in hours per day. Task duration is measured in days.

You set up calendars to assign to projects and resources, or use the predefined calendar with eight hours per day and five days per week with no holidays. You select the default calendar on the Define Project Management Implementation Options page.

- **Primary Project Role**

  The primary project role is the role that a resource most often fulfills on a project. Available values are based on project roles in Oracle Fusion Project Management. The default value is Project Team Member.

- **Resume Attachments**

  The application searches the text in a resource resume to find matches for keywords that are entered as requirements on a project resource request. The keyword occurrences are used in the resource qualification score calculation that indicates how well a resource meets the requested qualifications.

Resource Management Details

Resource Management details consist of the following attributes:

- **Manage Resource Availability and Staffing**

  Select this option for the resource to be eligible to fulfill project resource requests in Oracle Fusion Project Resource Management.

- Resource Pool

  You must select a resource pool if you select the **Manage resource availability and staffing** option. The default resource pool value is Resources with No Pool Membership.

- **Membership From Date**

  A resource's first pool membership from date must be equal to or later than the resource from date.

  Tip: Manage pool memberships for a resource on the Manage Resource Pool Memberships window.

Rate Details

The rate types on a resource definition are:

- **Cost Rate**: The rate for a unit of work that determines the cost for a resource on a project. To calculate the resource cost amount, the application multiplies the resource's labor effort in hours on the project by the resource's cost rate.
- **Bill Rate**: The rate for a unit of work that determines the invoice or revenue recognized amount for a resource on a project. To calculate the bill amount for a resource on a project, the application multiplies the labor effort by the project resource bill rate.

When you add a planning resource to a project, the application copies the resource cost and bill rates to the project if the resource rate currency is the same as the project currency.

You can edit planning resource rates directly on the project. You can edit rates for assigned resources, or resources who have pending assignment adjustments, directly on the assignment. The new rates are reflected in the labor cost and bill amounts on the resource's tasks. Rate changes that you make on the project or assignment don't affect the rates on the resource definition.

Related Topics

- Resource Pools: Explained
- How can I attach a resume to my resource profile?

Import Project Enterprise Resources Process

The Import Project Enterprise Resources process creates resources based on data from third-party applications that you load into the Project Enterprise Resource Interface table (PJT_PRJ_ENT_RES_INTERFACE).

The Import Project Enterprise Resources process:

- Validates and creates project enterprise labor or expense resources in Oracle Fusion Project Management based on the data that you load into the interface table
- Creates user accounts for labor resources
- Assigns default project roles to labor resources
- Reports process exceptions for invalid resources in an output report

To import resources:

1. Prepare data for loading and importing by using the Project Enterprise Resources Import Template or Project Enterprise Expense Resources Import Template macro-enabled Excel workbooks.
2. Click **Generate CSV File** in the templates to create worksheets to load to the interface table.

   Optionally bypass the Excel templates and manually create CSV files.
3. From the Scheduled Processes page, run the Load Interface File for Import process followed by the Import Project Enterprise Resources process.

For more information about file-based data import, see the File Based Data Import for Oracle Project Portfolio Management Cloud guide.

Import Project Enterprise Resources Execution Report

The Import Project Enterprise Resources Execution Report summarizes the number of successful transactions and errors encountered when you imported the resources. If the report has error messages, then:

1. Review the error message details for each resource and fix the issues.
2. Load the data that you fixed in the CSV file into the interface table again.
3. Resubmit the Import Project Enterprise Resources process.

Related Topics

- External Data Integration Services for Oracle Cloud: Overview
- File Based Data Import for Oracle Project Portfolio Management Cloud

Creating Project Enterprise Resources: Procedure

Create project enterprise resources to assign to projects, tasks, issues, or deliverables. You can create labor and expense type resources to add to projects. You must be a project enterprise resource to access Project Execution Management applications. If you manage resource availability and staffing in Oracle Fusion Project Resource Management, you must create managed project enterprise labor resources to fulfill project resource requests.

This topic describes the manual procedure to create one project enterprise resource. However, you can create multiple project enterprise resources with Cloud interfaces, processes, or services. Follow this navigation path to open the Create Project Enterprise Resource window.

1. Open the Setup and Maintenance work area, and go to the **Manage Project Enterprise Resources** task.
2. Click the **Manage Project Enterprise Resources** link.

Creating a Labor Resource

A project enterprise labor resource is a resource that you can assign to multiple projects. A managed project enterprise labor resource is a project enterprise labor resource whose availability and staffing are managed in Oracle Fusion Project Resource Management. You use managed project enterprise labor resources to fulfill project resource requests and directly assign to one or more projects.

To create a labor resource:

1. Click **Create** to open the Create Project Enterprise Resource window.
2. Select **Labor** in the **Type** field.
3. Select the **Create from HCM Person** option and select the person name to create the resource from an employee or contingent worker in Oracle Fusion HCM.

   If you create a project enterprise labor resource from an employee in Oracle Fusion HCM, the employee or contingent worker must have a unique e-mail address in a valid format and an active primary assignment in HCM.
4. Select the **Provision Project Roles** option to provision the default role assignments for a resource that you create from HCM. If you don't create the resource from an employee or contingent worker, then enter the resource name and a unique e-mail address. Enable the **Request User Account** option to request a user account and provision the default role assignments for the user.

   > **Note:** If you're implementing Oracle Fusion Project Resource Management, you don't have to create managed project enterprise labor resources from HCM persons. The application maintains resource available capacity for resources that are not HCM employees or contingent workers.
5. Enter the resource's personal details.
   - The default calendar is from the Define Project Management Implementation Options page.
   - The default primary project role is Project Team Member.
6. Upload a resume attachment to include text from the resource's resume in searches for keywords that are entered on project resource requests.
7. To create a managed project enterprise labor resource, select the **Manage resource availability and staffing** option.

   > **Note:** Only managed project enterprise labor resources are eligible to fulfill project resource requests in Oracle Fusion Project Resource Management.

8. Select a resource pool if you enable this option. The default resource pool is the **Resources with No Pool Membership** pool.
9. Enter the cost rate and bill rate for the resource.

   The cost rate and bill rate that you enter here are used as the default rates for new resource requests, and for resources that the project manager or project resource manager adds to the Manage Project Plan page and the Manage Project Resources page.
10. Click **Save and Close**.

Creating an Expense Resource

A project enterprise expense resource is a resource that you can assign to projects or tasks to track expenses in Project Execution Management applications.

To create an expense resource:

1. Click **Create** to open the Create Project Enterprise Resource window.
2. Select **Expense** in the **Type** field.
3. Select the **Create from Expenditure Type** option and select the expenditure type to create the resource based on an expenditure type that is defined in Oracle Fusion Project Foundation.

   If you don't create the resource from an existing expenditure type, enter the expense resource name and description.
4. Click **Save and Close**.

Related Topics

- Project Enterprise Labor Resources: How They're Automatically Created and Maintained

Importing HCM Resources to Create Project Enterprise Resources: Procedure

Use either of these methods to import resources from HCM:

Importing in Oracle Fusion Project Management

In Oracle Fusion Project Management:

1. Select the **Import HCM Persons as Project Enterprise Resources** action on the Manage Project User Provisioning page.
2. The process:

   - Creates project enterprise resources based on specified criteria for business unit, organization, and HCM manager
   - Provisions the default project-related enterprise roles to each resource
   - Assigns default attribute values such as resource calendar and project role
   - Assigns the employee hire date, or contingent worker placement date, as the resource from date
   - Assigns the termination date in HCM as the resource to date
   - Imports only active HCM employees and contingent workers

Importing in Oracle Fusion Project Resource Management

In Oracle Fusion Project Resource Management:

1. Specify your import criteria on the Manage Project Enterprise Labor Resource Maintenance Conditions page.
2. Click **Maintain Project Enterprise Labor Resources** and enable the option to create and update project enterprise labor resources.
3. The process imports employees and contingent workers based on your specified criteria and HCM hire and termination dates.

Updating Project Enterprise Resources with HCM Information: Procedure

To update project enterprise resource information in Oracle Fusion Project Management from HCM:

1. Select the resources on the Manage Project Enterprise Resources page that you want to update.
2. Select the **Update Information from HCM** action.
3. The process updates the following resource information from information in HCM:
    - Name
    - E-mail
    - Manager
    - Phone
    - Image

Updating Skills and Qualifications for Project Enterprise Labor Resources: Procedure

Resource managers consider resources' skills and qualifications when searching for resources to fulfill open project resource requests.

Content types are the skills, qualities, and qualifications that you track in talent profiles. Oracle Fusion Project Resource Management supports the following predefined HCM content types:

- Licenses and Certifications
- Competencies
- Degrees
- Honors and Awards
- Memberships
- Languages

Project enterprise labor resources can update their own skills and qualifications from the My Portrait page. After completing work on a project or after completing training or receiving certifications, resources may want to update their competencies and other qualifications to reflect their updated skills.

To update your skills and qualifications:

1. Navigate to My Portrait.

2. Click the **Next** icon until **Experience and Qualifications** appears.
3. Click the **Experience and Qualifications** icon.
4. Click **Edit Skills and Qualifications** in the Skills and Qualifications section.
5. Select a content type that is supported by Oracle Fusion Project Resource Management from the **Content Type** choice list. For example, select **Competencies**.
6. Click **Add**.
7. On the Select and Add secondary window, search for and select a competency.
8. Click **OK**.
9. In the Competencies section, select a proficiency.
10. Click **Expand** to enter the details.

    Note: The attributes for each content type vary. Enter the values required for the content type that you selected.

11. Click **Submit**.
12. Click **Yes** in the warning message window.
13. Click **OK** in the confirmation message window.

Defining Talent Profile Content Items for Project Resource Management: Procedure

A profile represents a resource's knowledge, skill, and level of expertise. Oracle Fusion Project Resource Management uses a resource's profile to determine if the resource has the qualifications and proficiencies requested for a project assignment.

Your implementation team defines talent profile information in Oracle Fusion Human Capital Management. Examples of talent profile information include competencies, licenses and certifications, and languages.

To define a talent profile content item:

1. Open the Setup and Maintenance work area, and go to the **Manage Profile Content Items** task.
2. Click the **Manage Profile Content Items** link.
3. Click **Create** to open the Create Content Item window.
4. Select a content type from the list of values. Oracle Fusion Project Resource Management supports the following content types:
    - Licenses and certifications
    - Competencies
    - Degrees
    - Honors and awards
    - Memberships
    - Languages
5. Enter a content item name.
6. Click **Continue**.
7. Enter the field values on the Create Content Item page.

    Note: Don't change the settings for the rating model.

8. Click **Save and Close**.

Project Enterprise Expense Resources: Explained

Use project enterprise expense resources to manage expense resources that can be assigned to projects or tasks in the Project Execution Management applications in Oracle Fusion Project Portfolio Management. You can use predefined project enterprise resource expense type options, create your own expense resource type, or create from expenditure type resources existing in project financial management in Oracle Fusion Project Foundation.

Consider the following attributes when creating a project enterprise expense resource:

- Type attribute
- Expenditure type option
- Expenditure type
- Expenditure type resource
- Unit of measure

Selecting the Type Attribute

You can add an expense type resource to a project. Project enterprise expenditure type resources are the Expense resource type.

Creating from Expenditure Type Option

Use the **Create from expenditure type option** to create expense type resources from expenditure type planning resources created in Oracle Fusion Project Foundation.

Selecting the Expenditure Type

Expenditure types can track various expenses on projects or tasks. You can link to existing expenditure types for expenses that are used regularly including hotel, airfare, and meals.

You can't edit predefined expenditure types.

Creating an Expenditure Type Resource

Identify unique expense requirements for your organization. For example, you may want to track cell phone expenses separately from home phone expenses on a specific project.

Managing Unit of Measure

You can't edit the unit of measure for expense resources on a project because the default value is currency.

Project Enterprise Labor Resource Cost and Bill Rates: Explained

During the search and evaluation of resources to fulfill a project resource request, a resource manager can view resource cost and bill rates and select a resource that meets the financial requirements of a project. Project assignment rates provide the data to calculate labor resource cost and bill amounts for analyzing margins and revenue forecasts. Resource and project managers can adjust the rates on project assignments to provide the most current reporting information.

Aspects of project enterprise labor resource cost and bill rates include:

- Defining resource rates

- Comparing rates when evaluating resources
- Populating project assignment cost and bill rates
- Adjusting project assignment rates
- Calculating project labor cost and bill amounts

Defining Resource Rates

Project application administrators can define cost and bill rates for a resource in the **Manage Project Enterprise Resources page - Create Project Enterprise Resource window**. Administrators can also define rates when importing resources from external sources such as third-party applications.

Resource rates are optional.

The resource rate types are:

- Cost Rate: The rate for a unit of work that determines the cost for a resource on a project.
- Bill Rate: The rate for a unit of work that determines the invoice or revenue recognized amount for a resource on a project.

Units of work are stated in hours.

Comparing Rates when Evaluating Resources

A project resource request can contain the following resource rates:

- Target cost and bill rates: Project managers can specify target cost and bill rates on a project resource request. Rates are optional on the request.
- Resource cost and bill rates: When you specify a resource for a request, the application copies the resource's cost and bill rates to the request.

When a resource manager searches for resources to fulfill a request, the resource's cost and bill rates appear on the Search and Evaluate Resources page for all resources in the search results. The resource manager uses the Compare Resources page to compare the target rates to the rates for selected resources.

Tip: Project and resource managers can also view the resource rates on the Resource Details page. This is especially useful if the resource manager doesn't perform a search for resources, but instead is considering only one resource to fulfill a request.

Populating Project Assignment Cost and Bill Rates

Assignment rate currency is based on the project currency. The application doesn't copy rates from the resource or project resource request to the assignment if the rate currency is different than the project currency. If rates aren't specified for the resource or project resource request, or if all available rates are in a currency other than the project currency, then the assignment is created without bill or cost rates.

The following table describes the methods of populating cost and bill rates on project assignments.

Method of Creating Assignment	Method of Populating Assignment Cost Rate	Method of Populating Assignment Bill Rate
Resource fulfills a project resource request	Assignment uses the resource cost rate	• Assignment uses the target bill rate from the project resource request

Method of Creating Assignment	Method of Populating Assignment Cost Rate	Method of Populating Assignment Bill Rate
		• If a target bill rate isn't specified on the request, then the assignment uses the resource bill rate
Resource is assigned directly to a project	Assignment uses the resource cost rate	Assignment uses the resource bill rate

Adjusting Project Assignment Rates

Project managers can adjust resource rates on the Manage Project Resources page for resources who are directly assigned to the project. Project managers can adjust the rates for any project resource on the Edit Project Resource Assignment page. Rate changes that you make in Oracle Fusion Project Management for confirmed resources are reflected on the assignment in Oracle Fusion Project Resource Management.

Resource managers can adjust resource rates on the Edit Project Resource Assignment page. Rate changes are reflected on the assignment in Oracle Fusion Project Management.

You can't adjust the assignment rate currency.

Adjusted rates are reflected in the labor cost and bill amounts on the resource's tasks.

Note: Cost and bill rate changes on the project or assignment don't affect the resource's cost and bill rates on the Manage Project Enterprise Resources page.

Calculating Project Labor Cost and Bill Amounts

To calculate the cost or bill amount of project labor resources, the application multiplies each resource's labor effort in hours by the resource's cost or bill rate.

Adjusting Project Enterprise Resource Cost and Bill Rates: Procedure

Project application administrators can adjust resource cost and bill rates for project enterprise labor resources.

Adjusting Rates for One Resource

To adjust cost and bill rates for one resource:

1. Select the resource and on the Manage Project Enterprise Resources page.
2. Click **Edit** to open the Edit Project Enterprise Resource window.

Adjusting Rates for Multiple Resources

To adjust cost and bill rates for multiple resources:

1. Select the resources and click **Adjust Resources** on the Manage Project Enterprise Resources page.
2. In the Adjust Resources window, select one or both rate types in the **Resource Attribute** drop-down list.
3. Enter new rates in the **Cost Rate** and **Bill Rate** fields and click **Save and Close**.

   The new rates apply to all resources listed in the Adjust Resources window.

Note: You can't change currency in the Adjust Resources window.

Adjusting Cost Rates for All Resources in a Business Unit

If you use Project Financial Management applications, you can adjust cost rates for all resources in a business unit as follows:

1. Select the resources on the Manage Project Enterprise Resources page.
2. In the **Actions** menu, select **Update Resource Cost Rates**.
3. Select the business unit, resource class rate schedule, and effective rate date.
4. Click **Update Resource Cost Rates** to run a process to update the cost rates for all project enterprise resources within a business unit, using the selected rate schedule.

Note: The Update Resource Rates for Project Enterprise Resources process updates cost rates only for employees and contingent workers.

FAQs for Manage Project Enterprise Resources

How can I remove the Project Application Administrator role from a resource?

To revoke a project-related role from a project user, select the role in the **Manage Project User Provisioning page - Edit Project User window - Role Details table**, and click the **Remove** icon.

How can I assign project roles by default when I import project enterprise labor resources?

Go to the Manage Project User Provisioning page, Default Provisioning Attributes tab, Default Project Role Provisioning for Project Execution Management Labor Resources section. Select the option to **Automatically provision roles when mass creating project enterprise labor resources**. The application automatically assigns the predefined and custom roles that you selected on the Define Role Assignments table to each resource when you create project users using any of these methods:

- Import HCM Persons as Project Enterprise Resources process
- Import Project Enterprise Resource process for Oracle Cloud
- Project Enterprise Resource External Service
- Maintain Project Enterprise Labor Resources
- Export Resources and Rates process from the planning resource breakdown structure in Oracle Project Financial Management to Oracle Fusion Project Management

Can I edit the name and e-mail for a project enterprise labor resource?

You can edit a resource name and e-mail if the resource was created in Oracle Fusion Project Management, doesn't have a user account, and isn't an employee or contingent worker.

You can't edit the name and e-mail once you start the process to create a user account and provision roles for the resource.

How can I diagnose issues with project resource validations?

Run the Project Resource Validation diagnostic test from the **Settings and Actions - Troubleshooting - Run Diagnostic Tests** menu to determine whether a specific project or all projects have valid project resources and resource allocations, project roles exist, placeholder resources are associated with project resource requests, and expense resources are valid. The test generates a report showing the results of five eligibility parameters.

- Project Enterprise Resource Test: Validates that project resources are valid project enterprise resources.
- Project Role Setup Test: Validates that project roles exist.

- Labor Resource Allocation Test: Validates that project resources have a valid allocation percentage. The resource assignment from and to date are within the project date range. All of the project resource allocation percentages are greater than zero and result in assigning the resource for less than or equal to 24 hours a day. All project resources are assigned valid project roles.
- Project Resource Requests for Placeholder Resources Test: Validates that placeholder resources that are associated with a resource request are in a Requested status. None of the placeholder resources that are in a Planned status are associated with resource requests.
- Expense Resource Test: Validates that project expense resources have no value for percentage allocation, effort, bill rate, cost rate, project role, e-mail, from date, and to date.

What's the difference between a project enterprise labor resource and a managed project enterprise labor resource?

A project enterprise labor resource is a resource that you can assign to multiple projects.

A managed project enterprise labor resource is a project enterprise labor resource whose availability and staffing are managed in Oracle Fusion Project Resource Management. You use managed project enterprise labor resources to fulfill project resource requests and directly assign to one or more projects.

What's the difference between a project enterprise labor resource and a project-specific resource?

You can assign a project enterprise labor resource to multiple projects. If you manage the availability and staffing of a project enterprise labor resource in Oracle Fusion Project Resource Management, then the resource is eligible to fulfill project resource requests. You can select the **Manage Resource Availability and Staffing** option for a project enterprise labor resource, and subsequently deselect the option. However, you can't change a managed project enterprise labor resource to a project-specific resource.

You can assign a project-specific resource to only one project, and subsequently change the project reference to a different project. You can't select the **Manage Resource Availability and Staffing** option for a project-specific resource. However, if you remove the project reference to change the resource to a project enterprise labor resource, then you can select the **Manage Resource Availability and Staffing** option.

6 Define Project Management Configuration

Overview

Define Project Management Configuration: Overview

In the Define Project Management Configuration activity, you configure Oracle Fusion Project Management to manage projects, tasks, requirements, deliverables, and resources, and to track and resolve issues. This activity contains advanced setup tasks that aren't required for a typical implementation of Project Execution Management applications.

Setup tasks in the Define Project Management Configuration activity are grouped into the following tasks and task lists.

Task or Task List	Description
Manage Project Management Implementation Options	Specify default attributes for the project enterprise such as calendars, progress exception thresholds, currency, FTE hours, and the e-mail banner.
Manage Enterprise Project Codes	Create and update enterprise project codes to capture additional details on a project using a predefined value set, free text, or numeric data type.
Manage Enterprise Task Codes	Create and update enterprise task codes to capture additional details on a project task using a predefined value set, free text, or numeric data type.
Manage Issue Types	Create and update issue types such as the General issue type.
Manage Deliverable Types	Create and update deliverable types such as the General deliverable type.
Manage Custom Attributes for Issues and Deliverables	Create and update custom attributes to capture additional details for issues and deliverables using a predefined value set, free text, or numeric data type.
Define Project Requirement Configuration	Configure Oracle Fusion Project Management to track requirements, such as features and backlog items, for products and product families.
Manage Project Management Messages	Review and manage messages for Oracle Fusion Project Management.
Manage Project Management Attachment Categories	Review and manage attachment categories for Oracle Fusion Project Management.
Manage Oracle Social Network Objects for Project Execution Management	Enable the display of information in Oracle Social Network about changes to Project Execution Management business objects, and select which attributes to include for each object.
Manage Enterprise Project Structure	Create and edit enterprise project structure nodes and manage the hierarchy of the nodes.

Manage Project Management Implementation Options

Setting Up Project Management Implementation Options: Procedure

Specify the default calendar, currency, and full time equivalent hours. Also, specify the progress exception thresholds for the project enterprise.

Setting Up the Default Calendars

Calendars determine the standard working and nonworking time, such as weekends and holidays, for resources and projects. Select the default calendars to assign to resources and new projects.

1. Open the Setup and Maintenance work area, and go to the **Manage Project Management Implementation Options** task.
2. Click the **Manage Project Management Implementation Options** link.
3. On the Define Project Management Implementation Options page, in the Default Calendars section, select a value for default project and resource calendars.
4. Click **Save and Close**.

Entering Progress Exception Thresholds

Progress exceptions are generated when team members enter progress amounts for a proposed start date, finish date, or planned hours that exceed the defined thresholds. Define the threshold values for task progress in days and hours.

1. Open the Setup and Maintenance work area, and go to the **Manage Project Management Implementation Options** task.
2. Click the **Manage Project Management Implementation Options** link.
3. On the Define Project Management Implementation Options page, in the Progress Exceptions section, enter the days and hours.
4. Click **Save and Close**.

Setting Up a Default Currency

The currency defined is used when a project is created.

1. Open the Setup and Maintenance work area, and go to the **Manage Project Management Implementation Options** task.
2. Click the **Manage Project Management Implementation Options** link.
3. On the Define Project Management Implementation Options page, in the Default Currency section, select a currency.
4. Click **Save and Close**.

Setting Up Default Full Time Equivalent Hours

Enter the full time equivalent (FTE) hours for resources that are used to calculate the labor demand FTE hours for reporting in the Project Hierarchy Dashboard and enterprise project structure. The default value is 520 hours.

1. Open the Setup and Maintenance work area, and go to the **Manage Project Management Implementation Options** task.
2. Click the **Manage Project Management Implementation Options** link.
3. On the Define Project Management Implementation Options page, in the Default Full Time Equivalent Hours section, enter hours.
4. Click **Save and Close**.

FAQs for Manage Project Management Implementation Options

What's the difference between project calendars and resource calendars?

Project calendars determine standard working and nonworking times for resources working on projects. For example, a project calendar can designate the total number of working hours per day and any holidays that occur during the project dates. A project calendar is used to schedule project tasks, and to estimate project duration.

Resource calendars determine the total available working hours for resources.

Your implementation team defines the default project and resource calendars that are automatically assigned to new projects and resources. However, a project manager can assign another calendar to a project. Similarly, a project application administrator can assign a different calendar to a resource.

Can I change the default value for the resource calendar that appears when I create a project enterprise labor resource?

Yes. On the Define Project Management Implementation Options page, you select a default resource calendar that the application automatically assigns to new project enterprise labor resources. If the default resource calendar does not meet the requirements for a specific project enterprise labor resource, then you can assign a different calendar to the resource.

Can I change the full time equivalent hours for resources in my organization?

Yes, the project application administrator can update the quarterly FTE hours on the Define Project Management Implementation Options page.

Why do some tasks have exceptions for progress entries?

A team member entered a proposed start date, proposed finish date, or an increase to the planned hours for the task that exceeds the progress thresholds defined in the project management implementation options.

Manage Enterprise Project and Task Codes

Project and Task Codes: Explained

Project and task codes enable project managers and team members to capture information using custom attributes that are specific to an organization. You can use project and task codes to analyze your projects by including them in the Oracle Transactional Business Intelligence (OTBI) reports.

Managing Project and Task Codes

You can create project and task codes with three different data types. The attributes that you create using project and task codes are available on all your project plans.

Data Type	Details
Value Set	40 project or task codes based on value sets.

Data Type	Details
	Use to define attributes that capture list of values. Define values for the project or task code in the **Value** column.
Numeric	10 project or task codes with numeric entry. Use to define attributes that capture numeric values.
Free Form Text	20 project or task codes with text fields. Use to define attributes that capture free-form text values. The maximum length for text is 200 characters.

Note: You can't assign the same code to both project and task codes because they share the same definition. As a result, you have a total of 70 codes available to use as project or task codes.

Using Project and Task Codes

You can view and update:

- Project codes from the Edit Project Details page. Click the project name link on the Manage Project plan page to access Edit Project Details page.
- Task codes as columns on the Manage Project Plan page. Use the Manage Columns action to show columns you want to see.
- Tasks codes using the link for each task from the Manage Tasks page.

Creating Project and Task Codes: Examples

Use project and task codes to capture additional attributes on your project plan based on your organization needs. The application allows you to create custom attributes for your project using the following setup tasks.

- **Manage Enterprise Project Codes**: Captures additional information for your project.
- **Manage Enterprise Task Codes**: Captures additional information about a task that can be viewed as additional columns in your project plan.

Creating Project Codes

In this example, you will create project codes to capture the negotiation savings details.

Your business requires you to define the savings that you must achieve on each negotiation made with a supplier and your actual savings. When you create a project for your negotiation, you set the saving goals and your actual savings in your project plan. Custom attributes such as project codes, enable you to capture this information in your project plan. Create the following custom attributes using the Manage Enterprise Project Codes task.

Data Type	Project Code	Column Name	Column Description
Numeric	Number 01	Sourcing Savings Goal	The savings goal for your negotiation.

Data Type	Project Code	Column Name	Column Description
Numeric	Number 02	Sourcing Savings Goal (%)	The savings goal for your negotiation in percentage.
Numeric	Number 03	Negotiated Savings	The actual savings achieved for your negotiation.
Numeric	Number 04	Negotiated Savings (%)	The actual savings achieved for your negotiation in percentage.

Creating Task Codes

In this example, you will create task codes to capture the roles for the resources working on your project.

You want to specify the roles required for your project before you assign resources to your tasks. You must create a column named Role in your project plan. Create the custom column using the Manage Enterprise Task Codes task.

Data Type	Task Code	Column Name	Column Description
Value Set	List of Values 01	Role	The role of the resource.

Enter the following values for roles.

Sequence	Value
1	Software Developer
2	Project Manager
3	Strategist
4	Quality Analyst
5	Information Developer

Note: The sequence defines the order in which the task code values appear in the column list on the Manage Project Plan page.

Manage Custom Attributes for Issues and Deliverables

Customizing Project Execution Management Applications: Explained

Customize view objects for Project Execution Management applications in Oracle Fusion Project Portfolio Management using Data Composer and Page Composer. You must be a project administrator to access the customizable pages.

The following sections describe the aspects of customization:

- Customizing objects
- Navigating to manage custom objects
- Using sandboxes

Customizing Objects

The following table summarizes the customizable view objects, pages, and regions in Project Execution Management applications. The view objects listed here are available on the Data Composer user interface for customizations. You can then expose the customizations to the corresponding user interface region or pages using the Page Composer.

View Object	Application Module	Corresponding Page or Region	Corresponding Business Process	Maximum Custom Attributes Allowed
RequirementVO	RequirementsAM	**Manage Backlog Items** page	Project Management, Plan Project, Track and Manage Project Requirements	170 columns, 20 date time fields, 50 number, 100 varchar
IssueVO	IssueManagementAM	**Manage Issues** page	Project Management, Control Project, Manage Project Issue	30 text fields including choice list, 5 number fields, 5 date time fields
DeliverableSimpleAssociation	DeliverablesAM	**Manage Deliverables** page	Project Management, Plan Project, Define Project Scope and Deliverables	30 text fields including choice list, 5 number fields, 5 date time fields
IssueTypeVO	IssueManagementAM	Manage Issue Types task	Project Management, Setup Project Management, Define Project Management Configuration, Manage Issue Types	30 text fields including choice list, 5 number fields, 5 date time fields
DeliverableTypeVO	DeliverablesAM	Manage Deliverable Types task	Project Management, Setup Project Management, Define Project Management Configuration, Manage Deliverable Types	30 text fields including choice list, 5 number fields, 5 date time fields
ResourceRequestVO	ResourceRequestAM ProjectManagerRequestAM	**Manage Project Resource Requests** page	Project Management, Manage Project Resources, Manage Resource Demand, Create Project Resource Request	100 text fields, 50 number fields, 20 date fields

View Object	Application Module	Corresponding Page or Region	Corresponding Business Process	Maximum Custom Attributes Allowed

Navigating to Manage Custom Objects

To customize objects, access the **Manage Project Execution Management Custom Objects** using the **Projects Custom Objects** link from the Navigator. To set up sandbox, select the **Manage Sandboxes** menu item from the **Administration** menu in the global area of Oracle Fusion Applications.

Using Sandboxes

You must create or select an appropriate sandbox, and set it as active to capture your customizations using Page Composer. Publish the sandbox to make your changes available to users.

Related Topics

- Customizing Page Headers and Task Labels for Change Orders: Explained

Define Project Requirement Configuration

Define Project Requirement Configuration: Overview

In the Define Project Requirement Configuration implementation tasks, you configure Oracle Fusion Project Management to track requirements, such as features and backlog items, for products and product families.

Following are the tasks in the Define Project Requirement Configuration task list:

Task List	Description
Manage Sprints	Short cycle of development that typically lasts between one and four weeks, in which teams use Agile methodology to develop features for release to consumers. For example, May 2013 and July 2013 represent monthly sprints.
Manage Product Families	Set of shippable products that share characteristics and address complimentary requirements. For example, a software company may have separate product families for HCM and CRM.
Manage Products	Related features bundled into a shippable unit to meet customer requirements. For example, a software company may have a project to develop a Workforce or Compensation Management product.
Manage Releases	Version of a new or enhanced product or product group that is made available to users outside of the development organization. For example, Release 1.0 for a new product or Release 2.1 for a subsequent product release.
Manage Project Requirement Statuses	Requirement statuses are set up as lookup code values that enable you to capture information specific to your project.
Manage Milestones	Milestones are set up as lookup code values that enable you to capture information specific to your user story.

Task List	Description
Manage Custom Attributes for Requirements	Enter any additional attributes for the backlog item. Provide attributes that allow customers enough flexibility to customize their application.

Manage Custom Attributes for Requirements

Customizing Project Execution Management Applications: Explained

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The following sections describe the aspects of customization:

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DeliverableSimpleAssociation	DeliverablesAM	**Manage Deliverables** page	Project Management, Plan Project, Define Project Scope and Deliverables	30 text fields including choice list, 5 number fields, 5 date time fields
IssueTypeVO	IssueManagementAM	Manage Issue Types task	Project Management, Setup Project Management, Define Project Management Configuration, Manage Issue Types	30 text fields including choice list, 5 number fields, 5 date time fields
DeliverableTypeVO	DeliverablesAM	Manage Deliverable Types task	Project Management, Setup Project Management, Define	30 text fields including choice list, 5 number fields, 5 date time fields

View Object	Application Module	Corresponding Page or Region	Corresponding Business Process	Maximum Custom Attributes Allowed
			Project Management Configuration, Manage Deliverable Types	
ResourceRequestVO	ResourceRequestAM ProjectManagerRequestAM	**Manage Project Resource Requests** page	Project Management, Manage Project Resources, Manage Resource Demand, Create Project Resource Request	100 text fields, 50 number fields, 20 date fields

Navigating to Manage Custom Objects

To customize objects, access the **Manage Project Execution Management Custom Objects** using the **Projects Custom Objects** link from the Navigator. To set up sandbox, select the **Manage Sandboxes** menu item from the **Administration** menu in the global area of Oracle Fusion Applications.

Using Sandboxes

You must create or select an appropriate sandbox, and set it as active to capture your customizations using Page Composer. Publish the sandbox to make your changes available to users.

Related Topics

- Customizing Page Headers and Task Labels for Change Orders: Explained

Manage Oracle Social Network Objects for Project Execution Management

Managing Oracle Social Network Objects for Project Execution: Procedure

Use Oracle Social Network (OSN) objects to share and collaborate on key attribute information from the application with stakeholders. This helps in making better business decisions based on the information that you obtain and analyze within your social network.

Managing the Oracle Social Network Objects

Follow these steps to manage Oracle Social Network objects:

1. Open the Setup and Maintenance work area, and go to the **Manage Oracle Social Network Objects for Project Execution Management** task.
2. Click the **Manage Oracle Social Network Objects for Project Execution Management** link.
3. In the Business Objects section, expand the **Oracle Social Network Objects**.
4. Under Project Management, select an object. The attributes for the selected object are displayed in the Attributes section below.

5. In the Attributes section, click **Add**. The Select Attributes window opens.
6. Enable or disable an attribute and click **OK**. The changes are reflected in the Attributes section.
7. Select the object and click **Enable Object** . The Enable Object window opens.
8. Select an option that decides how the business object integrates with Oracle Social Network.

Option	Outcome
Manual	User decides whether to share the object instance in the social network. This is the recommended option.
Automatic	Shares all instances of the object in the social network.
No	Doesn't share any of the object instance in the social network.

9. Click **OK**.
10. Click **Save**.

Manage Enterprise Project Structure

Enterprise Project Structures: Explained

Project application administrators can group projects in the enterprise for purposes of reporting to project executives. They can assign project executives three types of access to project hierarchy elements, such as owners, delegates, and viewers.

Use the Manage Enterprise Project Structure task in the Setup and Maintenance work area to assign participants to an EPS element.

Project Role	EPS Participant Role	Add, Delete, or Edit Elements	Assign or Remove Participants
Project application administrator	Not available	Yes	Yes
Project executive	Owner	No access to page	No access to page
Project executive	Delegate	No access to page	No access to page
Project executive	Viewer	No access to page	No access to page

Project executives can use the Project Hierarchy Dashboard page to view data and assign owners, delegates, and participants.

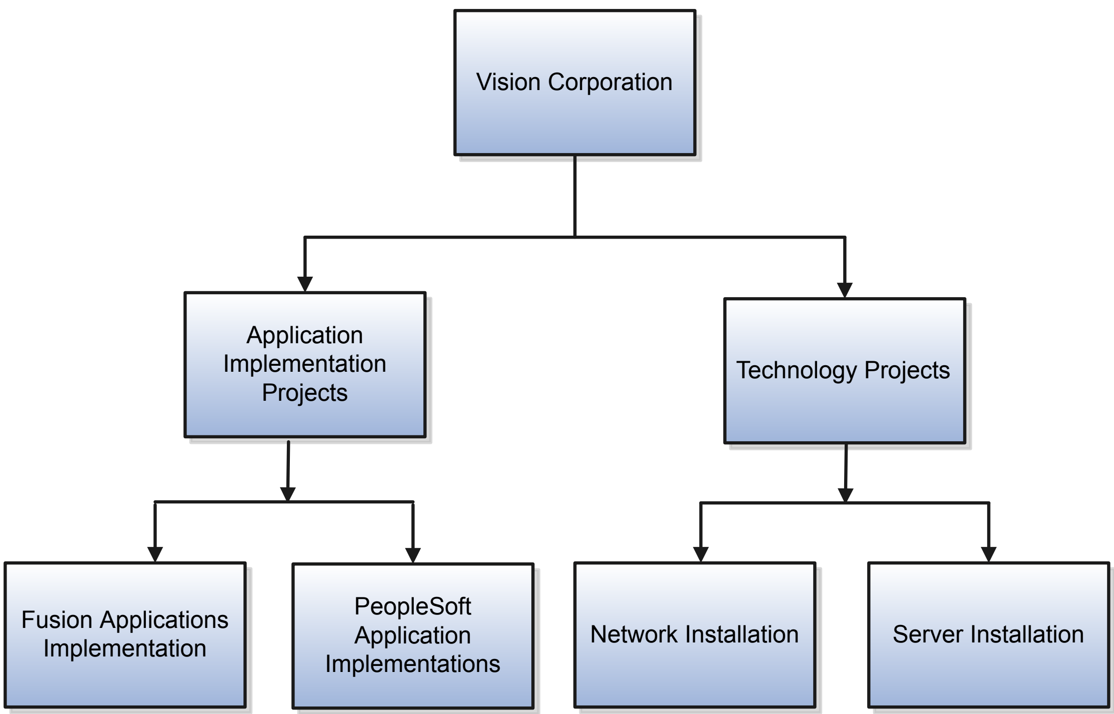
Project Role	EPS Participant Role	Add, Delete, or Edit Elements	Assign or Remove Participants
Project application administrator	Not available	No access to page	No access to page
Project executive	Owner	No	Yes

Project Role	EPS Participant Role	Add, Delete, or Edit Elements	Assign or Remove Participants
Project executive	Delegate	No	Yes
Project executive	Viewer	No	No

Each EPS element can have one directly assigned owner, one directly assigned delegate, and as many directly assigned viewers as needed. When you directly assign a person as an owner, delegate, or viewer to a parent EPS element, the person automatically inherits the same role for each child EPS element.

The following figure represents the project structure of Vision Corporation. Project executives of Vision Corporation want to view the labor demand for application implementation projects and technology projects. They may want to further view labor demand by project category. They can:

- Group application implementation projects by Oracle Fusion and PeopleSoft.
- Group technology projects by network and server installation.



Related Topics

- Project Labor Demand: How It's Calculated

Setting Up the Enterprise Project Structure: Procedure

Use the enterprise project structure (EPS) to allow summarization of project data to a higher level of categorization. Project application administrators can group projects in the enterprise for purposes of reporting to project executives.

To set up the EPS, project application administrators must do the following:

- Create elements and arrange them in a hierarchy.
- Add participants as owners, delegates, and viewers to each element as appropriate. Participants at parent elements receive the same role automatically for child elements.

  Note: A participant must also be assigned the Project Executive role to access the Project Hierarchy Dashboard.

- Submit the **Update EPS Data** process.

Creating an Enterprise Project Structure

You can create up to 10 levels in the project structure.

1. Open the Setup and Maintenance work area, and go to the **Manage Enterprise Project Structure** task.
2. In the **Enterprise Project Structure** section, select a project element.
3. Click the **Add Child Element** icon.
4. In the Add Child Element window, enter a name and description for the EPS element.
5. Do the following to add participants to an EPS element in the Participants section:
   a. Enter a direct owner in the name column.
   b. Enter a direct delegate in the name column.
   c. Click **Add Direct Viewer** to add additional viewers for the EPS element.
   d. Click **Save and Close.**
6. To organize projects into your EPS elements, select the Unassigned Projects element to view all unassigned projects. Newly created projects are automatically assigned to Unassigned Projects element.
7. Drag and drop projects from the Unassigned Projects element to move all the unassigned projects to the relevant elements.
8. Click **Done**.

Updating EPS Data

1. Navigate to the **Scheduled Processes** page.
2. On the Scheduled Processes page, click **Schedule New Process.**
3. In the Schedule New Process window, search and select the **Update EPS Data** process.
4. Click **OK.**
5. In the **Process Details** window, click **Submit.**
6. Click **OK** on the confirmation message.
7. Alternatively, a participant can use the **Update EPS Data** action on the Project Hierarchy Dashboard to update EPS data.

Integrate with Microsoft Project

Microsoft Project and Oracle Fusion Project Management: How They Work Together

Use Oracle Fusion Project Management integration with Microsoft Project to complete initial scheduling and what-if analysis in Microsoft Project before exporting the project plan to Oracle Fusion Project Management.

The integration of Microsoft Project versions 2007, 2010, 2013, and 2016 with Project Management application lets you schedule project plans, manage resource assignments, and track progress.

Following is an overview of installing Microsoft Project Integration, importing task codes into Microsoft Project, importing projects, and exporting project plans.

Installing Microsoft Project Integration Client

You can download and install the integration clients available for different versions of Microsoft Project to integrate with Project Management or Project Financial Management applications.

Before downloading the client, ensure that you have .NET Framework 4.5.2 or later versions installed on your computer. The following table provides the list of available clients and their features.

Client for Project Financial Management Applications	Supported Features
Microsoft Project 2007	Scheduling only.
Microsoft Project 2010, 2013, and 2016	Scheduling along with support of manual tasks, inactive tasks, free text, primary baseline, and so on.

Note: You can only have one integration client, either for Project Management or Project Financial Management applications, on your desktop. To switch between different clients, you must uninstall the existing client and install the other client.

To install Microsoft Project Integration client for Oracle Fusion Project Management:

1. From the Navigator, open Project Management.
2. From the Manage Project Plan page, open the Actions panel tab and select Install Microsoft Project Integration to download the client.
3. Save the client, extract the installation files to a local folder, and run setup from that folder.
4. From the Oracle Fusion Projects menu, select **Change Environment** and enter the Project Management environment details. The URL must contain the string projectsManagement. For example, https://msp-prj.vision.com/projectsManagement.

   You can change the environment URL at any time to support subsequent server changes.

Importing Task Codes into Microsoft Project

Use the **Import List of Values** menu option on the Oracle Fusion Projects menu to import values defined for task codes. Ensure that the task codes that you import don't match with any of the Microsoft Project column names. The following table lists the three task codes and the associated Microsoft Project fields.

Task Code	Associated Microsoft Project Fields
TASK_ EXT_TEXT01	Text1
TASK_ EXT_CODE01	OutlineCode1
TASK_EXT_NUM01	Number1

Use the **View Attribute Mapping** menu option to review how Oracle Fusion Project Management attributes map to Microsoft Project fields.

Importing Projects

Import projects (but not work plan templates) from Project Management work area to create new project files in Microsoft Project.

The following table describes how some important task-level attributes are imported or set. The project-level attributes such as status and project customer aren't imported into Microsoft Project.

Attribute	Description
Task attributes	Key imported attributes are: • Planned dates • Percent complete and physical percent complete • Total planned quantity. If calendar or scheduling settings differ, Microsoft Project recalculates effort or units to retain imported dates. Enterprise task codes are imported but project codes aren't imported. The task type for all imported tasks is set to Fixed Units.
Task constraints and dependencies	Project Management application doesn't support the constraint types As Late As Possible and As Soon As Possible. Other constraints are imported using the mapping described in the section on exporting project plan and scheduling information in this topic. If you assign start and finish dates to a task, then a Must Start On constraint is created for the task when you import the project into Microsoft Project.
Milestones	Tasks designated as milestone tasks are imported as milestones in Microsoft Project.

The following table describes how some important resource and resource assignment attributes are imported or set.

Attribute	Description
Resources	All labor and expense resources defined as project resources are imported.
Resource assignments	The following attributes are imported for resource assignments: • Planned dates • Planned, and remaining effort. The resources (task managers) that you assign to summary tasks are imported into Microsoft Project with zero allocation.

Attribute	Description
	• Actual costs for labor resources and actual and planned costs for expense resources. The cost amounts are imported using the project currency. Import processing reports an error if Microsoft Project doesn't support the project currency.

Exporting Project Plan and Scheduling Information

Export your project plan to Project Management work area after initial scheduling is complete in Microsoft Project and you have fixed all errors identified during prevalidation.

Important attributes exported or recreated at the task level include task name and dates, task codes, dependencies, constraints, and milestone indicators. A Microsoft Project task should have a contiguous assignment as Oracle Project Management Cloud application does not support split tasks; subsequently scheduling in Oracle Project Management Cloud application will use the original duration to calculate the dates. The following are the constraints and dependencies that are supported in Oracle Fusion Project Management.

Predecessor	Successor	Dependencies Allowed
Task	Task	Finish-to-start, Finish-to-finish, Start-to-start, and Start-to-finish
Task	Milestone	Finish-to-finish and Start-to-finish
Milestone	Task	Finish-to-start and Finish-to-finish
Milestone	Milestone	Finish-to-finish

Task date constraints are recreated in Oracle Fusion Project Management based on the following mapping:

Microsoft Project Constraint Type	Oracle Fusion Project Management Constraint Type
As Late As Possible	No constraint created in Oracle Fusion Project Management
As Soon As Possible	No constraint created in Oracle Fusion Project Management
Finish No Earlier Than	Finish On or After
Finish No Later Than	Finish By
Must Finish On	Finish On
Must Start On	Start On
Start No Earlier Than	Start On or After
Start No Later Than	Start By

When exporting milestone tasks, ensure that the tasks:

- Are lowest-levels task with zero duration, that is, the same start and finish dates.
- Have only one labor resource assignment with zero effort.
- Have percent work complete values of 0 or 100 percent. Any other values are set to zero before export.

When exporting projects to Project Management work area, Microsoft Project 2010 or later versions export the tasks based on various conditions as given in the following table.

Tasks	Condition
Inactive tasks	Doesn't export.
Manual tasks	Exports. If the manual task has invalid dates, Microsoft Project exports the dates and duration as blank.
Manual tasks with predecessor dependencies	Exports tasks without predecessor dependencies.
Summary tasks	Exports as automatic scheduled tasks. If the dates are missing, Project Management automatically populates them. **Note:** You must roll up the tasks in Project Management because of the change in the schedule mode of summary tasks
Summary tasks with dependencies on successor task	Doesn't export. You must remove dependencies on summary tasks after viewing the prevalidation messages.
Baseline	Exports the primary baseline, if available. If not available, Microsoft Project exports the baselines that are created using Start, Finish, Effort, or Duration values in Microsoft Project.

Exporting Resource Assignments

Important attributes transferred or recreated at the resource assignment level when you export projects include the resource name, planned dates, and total planned work and remaining work. The task type of all exported tasks is set to Fixed Effort in Project Management work area, which corresponding to the Microsoft Project task type of Fixed Work. However, resource assignment dates aren't revised based on task type in Project Management work area until you explicitly roll up data or schedule tasks.

Resources (task managers) that you assign to summary tasks must have zero allocation. Otherwise, the prevalidation check reports an error.

Note: The Peak value of a task resource assignment is exported when exporting the resource assignment from Microsoft Project to Project Management work area.

Exporting Resource Information

When exporting, only resources with task assignments are exported. The following table describes how resources are exported.

Oracle Fusion Project Management Resource Type	Microsoft Project Resource Type	Description
Labor	Work	Resources associated with resource assignments are linked to existing project enterprise labor resources if the e-mail address provided in Microsoft Project and Oracle Fusion Project Management match. Otherwise, a new planned resource is created at the project level in Oracle Fusion Project Management.
Expense	Cost	Resources are linked to existing project enterprise resources if the names match. Otherwise, a new project enterprise resource is created in Oracle Fusion Project Management.

Microsoft Project Prevalidation: Explained

Use prevalidation messages to identify errors that prevent export of your project plan from Microsoft Project to Oracle Fusion Project Management. You must fix all errors before exporting a project.

Identify tasks with prevalidation errors using the indicators in the Exception column in the Gantt Chart view of Microsoft Project.

Following is a brief description of the prevalidation checks.

Tip: After export, review the transfer report to determine if errors or warnings occurred for checks other than those performed during prevalidation.

Prevalidation Checks

The following table describes prevalidation rules for tasks and resource assignments.

Level	Rule
Lowest-level tasks	One labor and multiple expense resources are allowed for a lowest-level task. Remove other resources.
Summary tasks	Only one labor resource with zero allocation is allowed for a summary task. Remove all other resources.
Milestone tasks	No subtasks are allowed under milestone tasks. Milestones must be lowest-level tasks.

Level	Rule
Milestone tasks	Milestone tasks must have zero duration.
Milestone tasks	Only one labor resource, with zero effort, is allowed for a milestone task. Remove all other resources.

7 Define Project Resource Management Configuration

Define Project Resource Management Configuration: Overview

In the Define Project Resource Management Configuration activity, you configure Oracle Fusion Project Resource Management to manage the availability and staffing of resources, fulfill project resource requests, and monitor resource utilization. This activity contains advanced setup tasks that aren't required for a typical implementation of Project Execution Management applications.

Setup tasks in the Define Project Resource Management Configuration activity are grouped into the following tasks and task lists.

Task or Task List	Description
Manage Project Resource Management Implementation Options	Specify options used to control workflow notifications.
Define Attributes for Employees and Contingent Workers in Human Capital Management	Define the attributes that are required to manage employees and contingent workers in Oracle Fusion Human Capital Management, such as legislative data groups, business units, legal addresses, legal entities, legal entity HCM information, departments, and jobs.
Define Project Enterprise Labor Resources	Define project enterprise labor resources to use in Oracle Fusion Project Resource Management.
Manage Target Utilization Percentages	Configure the enterprise target utilization percentage and job-level percentage overrides.
Manage Custom Attributes for Project Resource Requests	Create and update custom attributes to capture additional details for project resource requests using free text, date, or numeric data type.
Manage Project Resource Management Messages	Review and manage messages for Oracle Fusion Project Resource Management.
Manage Project Resource Management Attachment Categories	Review and manage attachment categories for Oracle Fusion Project Resource Management.

Manage Project Resource Management Implementation Options

Project Resource Management Workflow Notifications: Explained

Send notifications when you submit project resource requests, propose, approve, or adjust resource assignments, or change resource staffing options.

The aspects of project resource management notifications include:

- Actions that prompt notifications
- Notification settings
- Workflow notification example

Actions That Prompt Notifications

The following table lists the actions that prompt notifications, the notification recipient, and the next step for the recipient.

Action Performed By	Action	Recipient	Required Action for Recipient
Project resource requester	Submit project resource request for fulfillment Approve or reject proposed resource for assignment Submit assignment schedule change	Staffing owner	Information only Approve or reject assignment schedule change (for submitted assignment schedule changes)
Project resource requester	Approve resource for assignment Adjust assignment schedule or cancel assignment	Resource	Information only
Staffing owner	Propose resource to fulfill assignment Submit assignment schedule change Submit assignment cancellation	Project resource requester	Approve or reject the proposed resource, assignment schedule change, and assignment cancellation, by using any of these methods: • **Approve** or **Reject** buttons in the notification in the Worklist: Notifications and Approvals section • **Approve** or **Reject** links in the e-mail notification • Actions menu on the project resource request
Administrator Maintain Project Enterprise Labor Resource process	Deselect the **Manage Resource Availability and Staffing** option in the resource definition	Resource pool owner Project managers for projects where the resource is a team member	Information only

Action Performed By	Action	Recipient	Required Action for Recipient
Administrator Maintain Project Enterprise Labor Resource process	Enter a **To Date** in the resource definition to set a date when the resource is no longer available for staffing	Project managers for projects where the resource is a team member	Information only

Notification Settings

Enable notifications by selecting the following options on the Manage Project Resource Management Implementation Options page:

- Notify staffing owner when a project resource request is submitted
- Notify requester when a resource is proposed to fulfill a project resource request

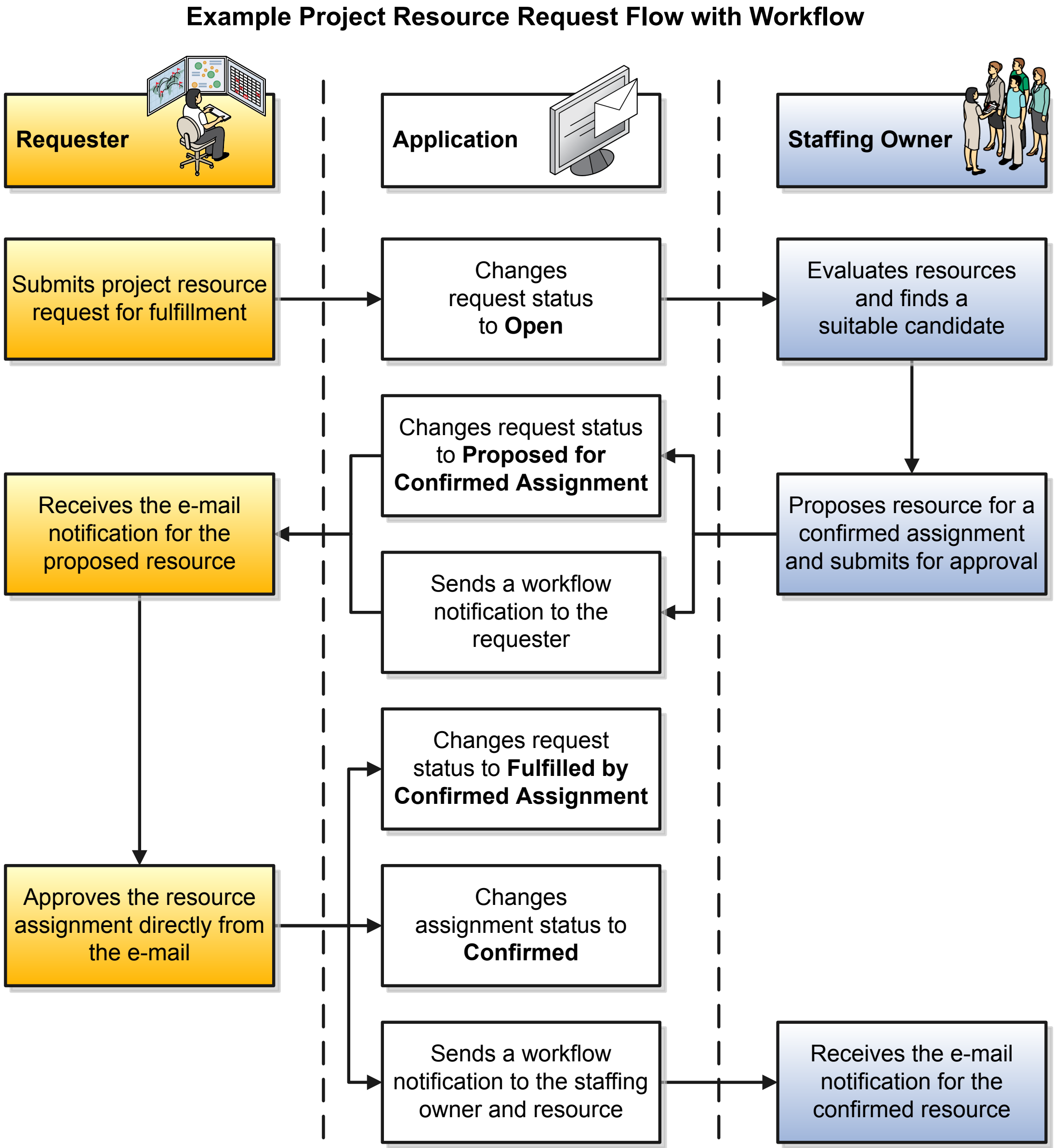
  Tip: If you don't enable this workflow implementation option, the requester can still approve or reject the resource on the project resource request.

- Notify resource when a project resource assignment is created or adjusted

Workflow notifications are automatically enabled to notify a resource pool owner and project managers when a resource is no longer eligible to fulfill project resource requests. No implementation setup is required for this type of workflow.

Workflow Notification Example

The following figure shows an example project resource request flow that uses workflow notifications.



In this example:

1. A project manager submits a request for a new project resource.
2. The resource manager searches for qualified, available candidates and finds a resource that is a good match for the project.
3. The resource manager proposes the resource for a confirmed assignment and submits the request for the project manager to approve the proposed resource.

4. The project manager receives an e-mail notification requesting approval of the resource, and approves the resource. This action fulfills the project resource request, confirms the resource on a project assignment, and launches an e-mail notification to inform the resource and resource manager that the resource is approved.

Configurable Resource Management Approval Workflow Rules: Explained

When approval requirements for proposed resource assignments or assignment adjustments are beyond the project resource requester or staffing owner approval, you can edit the approval flow and configure rules that determine your approvers. Project application administrators can configure additional business routing rules for the Proposed Resource Approval workflow so that resource assignments are routed to the appropriate persons for approval.

The aspects of resource management approval workflow rules that are discussed in this topic include:

- Use cases and examples
- Request Proposed Resource Approval composite
- Approve a Proposed Resource task
- Notify Participant of Rejection or Approval of Proposed Resource task
- Structured definitions
- Workflow participants

Use Cases and Examples

Use the **Oracle BPM Worklist application - Task Configuration** task flow to review and modify approval workflow to support these use cases:

- Route proposed resource or assignment adjustment approval notifications sequentially to a hierarchy of users with approval authorization, such as line managers and the managers to whom they report.
- Route proposed resource or assignment adjustment approval notifications in parallel to users with different roles, such as resource pool owners and staffing owners.
- Route proposed resource or assignment adjustment approval notifications to a single or list of approvers for situations when no one else is identified through other rules.

These are examples of scenarios that are made possible with business routing rules:

- If a proposed resource has a line manager, then the line manager must approve all confirmed and reserved assignments, as well as assignment adjustments, for the resource.
- If the target bill rate on the request is lower than the proposed resource's cost rate, then the resource's line manager must approve the assignment.
- If the requested hours exceed a specified amount, for example 400 hours, then notify the resource's pool owner when a resource is confirmed for the assignment.

Request Proposed Resource Approval Composite

The **Request Proposed Resource Approval** workflow composite contains two tasks that you can view or modify in Oracle BPM Worklist:

- Approve a proposed resource (**ApproveProposeResource** task)
- Notify a participant of a rejection or approval of the proposed resource (**NotificationProposeResource** task)

Both tasks in this workflow composite include assignment adjustments.

The following two sections list information about each participant that's delivered for the tasks in this composite.

Approve a Proposed Resource Task

This table lists the Stage 1 participants that are delivered for the task to approve a proposed resource. The table includes the rule type, rule set, sample rules, and indicates if the participants are delivered active by default in the application.

Participant	Rule Type	Delivered Active or Inactive	Rule Set	Sample Rules
Requester Participant (RequesterParticipant)	Single	Active	Requester Participant (RequesterParticipantRuleSet	• Proposed Resource Requester Approval Rule **(SoaOLabel.ProposedResou** • Proposed Resource Without Requester Approval Rule **(SoaOLabel.ProposedResou**
Resource Approval Parallel Participant ResourceApprovalParallelPart	Parallel	Inactive	Resource Proposal Parallel Approval (ResourceProposalParallelAp	• Proposed Resource Line Manager Parallel Approval Rule **(SoaOLabel.ProposedResou** • Proposed Resource Project Enterprise Resource Manager Parallel Approval Rule **(SoaOLabel.ProposedResou** • Proposed Resource Without Manager Parallel Approval Rule **(SoaOLabel.ProposedResou**
Resource Approval FYI Participant (ResourceApprovalFYIParticip	FYI	Inactive	Resource Proposal FYI (ResourceProposalFYIRuleSe	• Proposed Resource FYI Rule **(SoaOLabel.ProposedResou** • Proposed Resource Pool Owner FYI Rule **(SoaOLabel.ProposedResou**
Resource Approval Serial Participant (ResourceApprovalSerialParti	Serial	Inactive	Resource Proposal Serial Approval (ResourceProposalSerialAppr	• Resource Serial Approval Rule **(SoaOLabel.ProposedResou**
Adjusted Assignment Requester Participant (AdjustedAssignmentRequest	Single	Active	Adjusted Assignment Requester Participant (AdjustedAssignmentRequest	• Adjusted Assignment Schedule Primary Project Manager Approval Rule **(SoaOLabel.AdjustedAssig** • Adjusted Assignment Schedule Staffing Owner

Participant	Rule Type	Delivered Active or Inactive	Rule Set	Sample Rules
				Approval Rule **(SoaOLabel.AdjustedAssig** • Adjusted Assignment Schedule Without Staffing Owner Approval Rule **(SoaOLabel.AdjustedAssig** • Canceled Assignment Primary Project Manager Approval Rule **(SoaOLabel.CanceledAssig** • Skip Participants for Proposed Resource Approval Rule **(SoaOLabel.SkipParticipa**
Adjusted Assignment Approval Parallel Participant (AdjustedAssignmentApprova	Parallel	Inactive	Adjusted Assignment Approval Parallel Participant (AdjustedAssignmentApprova	• Adjusted Assignment Schedule Line Manager Approval Rule **(SoaOLabel.AdjustedAssig** • Adjusted Assignment Schedule Project Enterprise Resource Manager Rule **(SoaOLabel.AdjustedAssig** • Adjusted Assignment Schedule Without Manager Approval Rule **(SoaOLabel.AdjustedAssig** • Canceled Assignment Line Manager Approval Rule **(SoaOLabel.CanceledAssig** • Canceled Assignment Project Enterprise Resource Manager Approval Rule **(SoaOLabel.CanceledAssig** • Canceled Assignment Without Manager Approval Rule **(SoaOLabel.CanceledAssig** • Skip Participants for Proposed Resource

Participant	Rule Type	Delivered Active or Inactive	Rule Set	Sample Rules
				Approval Rule **(SoaOLabel.SkipParticipa**
Adjusted Assignment Approval Serial Participant (AdjustedAssignmentApprova	Serial	Inactive	Adjusted Assignment Approval Serial Participant (AdjustedAssignmentApprova	Adjusted Assignment Serial Approval Rule (SoaOLabel. AdjustedAssignmentSerialApprovalRule)

This table lists the Stage 2 participants that are delivered for the task to approve a proposed resource. The table includes the rule type, rule set, sample rules, and indicates if the participants are delivered active by default in the application.

Participant	Rule Type	Delivered Active or Inactive	Rule Set	Sample Rules
Adjusted Assignment Serial Approval Stage 2 Participant (AdjustedAssignmentSerialAp	Serial	Active	Adjusted Assignment Serial Approval Stage 2 Participant rule set (AdjustedAssignmentSerialAp	Adjusted Assignment Serial Approval Stage 2 Rule (SoaOLabel. AdjustedAssignmentSerialApprovalStag
Proposed Resource Serial Approval Stage 2 Participant (ProposedResourceSerialApp	Serial	Active	Proposed Resource Serial Approval Stage 2 Participant rule set (ProposedResourceSerialApp	Proposed Resource Serial Approval Stage 2 Rule (SoaOLabel. ProposedResourceSerialApprovalStage

Notify Participant of Rejection or Approval of Proposed Resource Task

This table lists the participants that are delivered for the task to notify a participant of a rejection or approval of a proposed resource. The table includes the rule type, rule set, sample rule, and indicates if the participants are delivered active by default in the application.

Participant	Rule Type	Delivered Active or Inactive	Rule Set	Sample Rules
Staffing Owner Participant (StaffingOwnerParticipant)	FYI	Active	Notification Participant rule set (NotificationParticipatRuleset)	• Proposed Resource Staffing Owner Notification Rule **(SoaOLabel.ProposedResou**
Resource Notification Participant (ResourceNotificationParticipa	FYI	Inactive	Alternate Notification Propose Resource rule set (AlternateNotificationPropose	• Proposed Resource Notification Rule **(SoaOLabel.ProposedResou**
Adjusted Assignment Notification Participant (AdjustedAssignmentNotificat	FYI	Active	Adjusted Assignment Notification Participant rule set (AdjustedAssignmentNotificat	• Adjusted Assignment Schedule Resource Management Requester Notification Rule **(SoaOLabel.AdjustedAssig**

Participant	Rule Type	Delivered Active or Inactive	Rule Set	Sample Rules
				• Adjusted Assignment Schedule Staffing Owner Notification Rule **(SoaOLabel.AdjustedAssig** • Adjusted Assignment Schedule Project Management Requester Notification Rule **(SoaOLabel.AdjustedAssig** • Adjusted Assignment Schedule Primary Project Manager Notification Rule **(SoaOLabel.AdjustedA** • Canceled Assignment Requester Notification Rule **(SoaOLabel.CancelAssignm** • Canceled Assignment Staffing Owner Notification Rule **(SoaOLabel.CancelAssignm** • Skip Participants for Adjusted Assignment Notification Rule **(SoaOLabel.SkipParticipa**

Structured Definitions

To configure the business routing rules, access the payload path: **Task.payload.process.processRequest**.

In this payload you have access to the following structured definitions that contain data that you can use to configure business routing rules. The list includes the structured definition payload location.

- Request Details (**`requestDetails`**)
  - **`Task.payload.process.processRequest.requestDetails`**
- Resource Information (**`resourceInfomation`**)
  - **`Task.payload.process.processRequest.resourceInfomation`**
- Qualifications (**`qualifications`**)
  - **`Task.payload.process.processRequest.qualifications`**
- Keywords (**`keywords`**)
  - **`Task.payload.process.processRequest.keywords`**

This list contains examples of data contained in the structured definitions that you can use to configure business routing rules.

- Assignment duration
- Assignment total hours
- Project name
- Project number
- Project organization for the project
- Project status
- Proposed resource
- Request location
- Requested project role
- Requested qualification
- Requested resource
- Requested target cost rate, bill rate, and currency
- Resource cost rate, bill rate, and currency
- Resource pool of the proposed resource

Workflow Participants

This list contains the participants and corresponding payload locations that you can use to configure business routing rules.

- Line manager
    - `Task.payload.process.processRequest.resourceInformation.lineManagerInformation.userName`
- Manager from project enterprise resource definition
    - `Task.payload.process.processRequest.resourceInformation.perManagerInformation.userName`
- Pool owner for proposed resource
    - `Task.payload.process.processRequest.resourceInformation.poolOwnerInformation.userName`
- Primary project manager on the project
    - `Task.payload.process.processRequest.resourceInformation.primaryProjectManagerInformation.userName`
- Requester
    - `Task.payload.process.processRequest.requestDetails.requestorInformation.userName`
- Resource
    - `Task.payload.process.processRequest.resourceInformation.resourceInformation.userName`
- Staffing owner
    - `Task.payload.process.processRequest.requestDetails.staffingOwnerInformation.userName`
- Primary staffing owner on the project
    - `Task.payload.process.processRequest.requestDetails.primaryStaffingOwnerInformation.userName`

Related Topics

- Oracle Fusion Middleware Developing SOA Applications with Oracle SOA Suite

Define Attributes for Employees and Contingent Workers in Human Capital Management

Manage Legislative Data Groups

Legislative Data Groups: Explained

Legislative data groups are a means of partitioning payroll and related data. At least one legislative data group is required for each country where the enterprise operates. Each legislative data group is associated with one or more payroll statutory units. Each payroll statutory unit can belong to only one legislative data group.

Payroll-related information, such as elements, is organized by legislative data groups. Each legislative data group:

- Marks a legislation in which payroll is processed.
- Is associated with a legislative code, currency, and its own cost allocation key flexfield structure.
- Is a boundary that can share the same set up and still comply with the local laws.
- Can span many jurisdictions as long as they are within one country.
- Can contain many legal entities that act as payroll statutory units.

Manage Business Unit

Business Units: Explained

A business unit is a unit of an enterprise that performs one or many business functions that can be rolled up in a management hierarchy. A business unit can process transactions on behalf of many legal entities. Normally, it has a manager, strategic objectives, a level of autonomy, and responsibility for its profit and loss. Roll business units up into divisions if you structure your chart of accounts with this type of hierarchy.

In Oracle Fusion Applications you do the following:

- Assign your business units to one primary ledger. For example, if a business unit is processing payables invoices, then it must post to a particular ledger. This assignment is required for your business units with business functions that produce financial transactions.
- Use a business unit as a securing mechanism for transactions. For example, if you run your export business separately from your domestic sales business, then secure the export business data to prevent access by the domestic sales employees. To accomplish this security, set up the export business and domestic sales business as two separate business units.

The Oracle Fusion Applications business unit model provides the following advantages:

- Enables flexible implementation

- Provides consistent entity that controls and reports on transactions
- Shares sets of reference data across applications

Business units process transactions using reference data sets that reflect your business rules and policies and can differ from country to country. With Oracle Fusion Application functionality, you can share reference data, such as payment terms and transaction types, across business units, or you can have each business unit manage its own set depending on the level at which you want to enforce common policies.

In countries where gapless and chronological sequencing of documents is required for subledger transactions, define your business units in alignment with your legal entities to ensure the uniqueness of sequencing.

In summary, use business units for:

- Management reporting
- Transaction processing
- Transactional data security
- Reference data sharing and definition

Brief Overview of Business Unit Security

A number of Oracle Fusion Applications use business units to implement data security. You assign roles like Accounts Payable Manager to users to permit them to perform specific functions, and you assign business units for each role to users to give them access to data in those business units. For example, users which have been assigned a Payables role for a particular business unit, can perform the function of payables invoicing on the data in that business unit. Roles can be assigned to users manually using the Security Console, or automatically using provisioning rules. Business Units can be assigned to users using the Manage Data Access for Users task in Setup and Maintenance.

Related Topics

- Reference Data Sets and Sharing Methods: Explained

Manage Legal Addresses

Creating Legal Jurisdictions, Addresses and Authorities: Examples

Define legal jurisdictions and related legal authorities to support multiple legal entity registrations, which are used by Oracle Fusion Tax and Oracle Fusion Payroll.

Legal Jurisdictions

Create a legal jurisdiction by following these steps:

1. **Navigator** > **Setup and Maintenance** > **Manage Legal Jurisdictions** > **Go to Task**.
2. Select **Create**.
3. Enter a unique **Name**, United States Income Tax.
4. Select a **Territory**, United States.
5. Select a **Legislative Category**, Income tax.
6. Select **Identifying**, Yes. Identifying indicates the first jurisdiction a legal entity must register with to do business in a country.
7. Enter a **Start Date** if desired. You can also add an **End Date** to indicate a date that the jurisdiction may no longer be used.
8. Select a **Legal Entity Registration Code**, EIN or TIN.
9. Select a **Legal Reporting Unit Registration Code**, Legal Reporting Unit Registration Number.

10. Optionally enter one or more **Legal Functions**.
11. **Save and Close**.

Legal Addresses for Legal Entities and Reporting Units

Create a legal address for legal entities and reporting units by following these steps:

1. **Navigator** > **Setup and Maintenance** > **Manage Legal Address** > **Go to Task**.
2. Select **Create**.
3. Select **Country**.
4. Enter **Address Line 1**, Oracle Parkway.
5. Optionally enter **Address Line 2**, and **Address Line 3**.
6. Enter or Select **Zip Code**, 94065.
7. Select **Geography** 94065 and **Parent Geography** Redwood Shores, San Mateo, CA.
8. Optionally enter a **Time Zone**, US Pacific Time.
9. **OK**.
10. **Save and Close**.

Legal Authorities

Create a legal authority by following these steps:

1. **Navigator** > **Setup and Maintenance** >**Manage Legal Authorities** > **Go to Task**.
2. Enter the **Name**, California Franchise Tax Board.
3. Enter the **Tax Authority Type**, Reporting.

   Note: Create an address for the legal authority.

4. Select **Create**.
5. The **Site Number** is automatically assigned.
6. Optionally enter a **Mail Stop**.
7. Select **Country**, United States
8. Enter **Address Line 1**, 121 Spear Street, Suite 400.
9. Optionally enter **Address Line 2**, and **Address Line 3**.
10. Enter or Select **Zip Code**, 94105.
11. Select **Geography** 94105 and **Parent Geography** San Francisco, San Francisco, CA.
12. **OK**.
13. Optionally enter a **Time Zone**, US Pacific Time.
14. Optionally click the **One-Time Address** check box.
15. The **From Date** defaults to today's date. Update if necessary.
16. Optionally enter a **To Date** to indicate the last day the address can be used.

    Note: You can optionally enter **Address Purpose** details.

17. Select **Add Row**.
18. Select **Purpose**.
19. The **Purpose from Date** will default to today's date.
20. Optionally enter a **Purpose to Date**.
21. **OK**.
22. **Save and Close**.

Related Topics

- Legal Authorities: Explained

- Jurisdictions and Legal Authorities: Explained

Manage Legal Entity

Legal Entities: Explained

A legal entity is a recognized party with rights and responsibilities given by legislation.

Legal entities have the following rights and responsibilities to:

- Own property
- Trade
- Repay debt
- Account for themselves to regulators, taxation authorities, and owners according to rules specified in the relevant legislation

Their rights and responsibilities may be enforced through the judicial system. Define a legal entity for each registered company or other entity recognized in law for which you want to record assets, liabilities, expenses and income, pay transaction taxes, or perform intercompany trading.

A legal entity has responsibility for elements of your enterprise for the following reasons:

- Facilitating local compliance
- Minimizing the enterprise's tax liability
- Preparing for acquisitions or disposals of parts of the enterprise
- Isolating one area of the business from risks in another area. For example, your enterprise develops property and also leases properties. You could operate the property development business as a separate legal entity to limit risk to your leasing business.

The Role of Your Legal Entities

In configuring your enterprise structure in Oracle Fusion Applications, the contracting party on any transaction is always the legal entity. Individual legal entities:

- Own the assets of the enterprise
- Record sales and pay taxes on those sales
- Make purchases and incur expenses
- Perform other transactions

Legal entities must comply with the regulations of jurisdictions, in which they register. Europe now allows for companies to register in one member country and do business in all member countries, and the US allows for companies to register in one state and do business in all states. To support local reporting requirements, legal reporting units are created and registered.

You are required to publish specific and periodic disclosures of your legal entities' operations based on different jurisdictions' requirements. Certain annual or more frequent accounting reports are referred to as statutory or external reporting. These reports must be filed with specified national and regulatory authorities. For example, in the United States (US), your publicly owned entities (corporations) are required to file quarterly and annual reports, as well as other periodic reports, with the Securities and Exchange Commission (SEC), which enforces statutory reporting requirements for public corporations.

Individual entities privately held or held by public companies do not have to file separately. In other countries, your individual entities do have to file in their own name, as well as at the public group level. Disclosure requirements are diverse. For example, your local entities may have to file locally to comply with local regulations in a local currency, as well as being included in your enterprise's reporting requirements in different currency.

A legal entity can represent all or part of your enterprise's management framework. For example, if you operate in a large country such as the United Kingdom or Germany, you might incorporate each division in the country as a separate legal entity. In a smaller country, for example Austria, you might use a single legal entity to host all of your business operations across divisions.

Legal Entity in Oracle Fusion: Points to Consider

Oracle Fusion Applications support the modeling of your legal entities. If you make purchases from or sell to other legal entities, define these other legal entities in your customer and supplier registers. These registers are part of the Oracle Fusion Trading Community Architecture.

When your legal entities are trading with each other, represent them as legal entities and as customers and suppliers in your customer and supplier registers. Use legal entity relationships to determine which transactions are intercompany and require intercompany accounting. Your legal entities can be identified as legal employers and therefore, are available for use in Human Capital Management (HCM) applications.

Several decisions you should consider when you create legal entities.

- The importance of using legal entity on transactions
- Legal entity and its relationship to business units
- Legal entity and its relationship to divisions
- Legal entity and its relationship to ledgers
- Legal entity and its relationship to balancing segments
- Legal entity and its relationship to consolidation rules
- Legal entity and its relationship to intercompany transactions
- Legal entity and its relationship to worker assignments and legal employer
- Legal entity and payroll reporting
- Legal reporting units

The Importance of Using Legal Entities on Transactions

All of the assets of the enterprise are owned by individual legal entities. Oracle Fusion Financials allow your users to enter legal entities on transactions that represent a movement in value or obligation.

For example, a sales order creates an obligation on the legal entity that books the order to deliver the goods on the acknowledged date. The creation also creates an obligation on the purchaser to receive and pay for those goods. Under contract law in most countries, damages can be sought for both:

- Actual losses, putting the injured party in the same state as if they had not entered into the contract.
- What is called loss of bargain, or the profit that would have made on a transaction.

In another example, if you revalued your inventory in a warehouse to account for raw material price increases, the revaluation and revaluation reserves must be reflected in your legal entity's accounts. In Oracle Fusion Applications, your inventory within an inventory organization is managed by a single business unit and belongs to one legal entity.

Legal Entity and Its Relationship to Business Units

A business unit can process transactions on behalf of many legal entities. Frequently, a business unit is part of a single legal entity. In most cases, the legal entity is explicit on your transactions. For example, a payables invoice has an explicit legal entity field. Your accounts payables department can process supplier invoices on behalf of one or many business units.

In some cases, your legal entity is inferred from your business unit that is processing the transaction. For example, Business Unit ACM UK has a default legal entity of InFusion UK Ltd. When a purchase order is placed in ACM UK, the legal entity InFusion UK Ltd is legally obligated to the supplier. Oracle Fusion Procurement, Oracle Fusion Project Portfolio Management, and Oracle Fusion Supply Chain applications rely on deriving the legal entity information from the business unit.<

Legal Entity and Its Relationship to Divisions

The division is an area of management responsibility that can correspond to a collection of legal entities. If wanted, you can aggregate the results for your divisions by legal entity or by combining parts of other legal entities. Define date-effective hierarchies for your cost center or legal entity segment in your chart of accounts to facilitate the aggregation and reporting by division. Divisions and legal entities are independent concepts.

Legal Entity and Its Relationship to Ledgers

One of your major responsibilities is to file financial statements for your legal entities. Map legal entities to specific ledgers using the Oracle Fusion General Ledger Accounting Configuration Manager. Within a ledger, you can optionally map a legal entity to one or more balancing segment values.

Legal Entity and Its Relationship to Balancing Segments

Oracle Fusion General Ledger supports up to three balancing segments. Best practices recommend one segment represents your legal entity to ease your requirement to account for your operations to regulatory agencies, tax authorities, and investors. Accounting for your operations means you must produce a balanced trial balance sheet by legal entity. If you account for many legal entities in a single ledger, you must:

1. Identify the legal entities within the ledger.
2. Balance transactions that cross legal entity boundaries through intercompany transactions.
3. Decide which balancing segments correspond to each legal entity and assign them in Oracle Fusion General Ledger Accounting Configuration Manager. Once you assign one balancing segment value in a ledger, then all your balancing segment values must be assigned. This recommended best practice facilitates reporting on assets, liabilities, and income by legal entity.

Represent your legal entities by at least one balancing segment value. You may represent it by two or three balancing segment values if more granular reporting is required. For example, if your legal entity operates in multiple jurisdictions in Europe, you might define balancing segment values and map them to legal reporting units. You can represent a legal entity with more than one balancing segment value. Do not use a single balancing segment value to represent more than one legal entity.

In Oracle Fusion General Ledger, there are three balancing segments. You can use separate balancing segments to represent your divisions or strategic business units to enable management reporting at the balance sheet level for each. This solution is used to empower your business unit and divisional managers to track and assume responsibility for their asset utilization or return on investment. Using multiple balancing segments is also useful when you know at the time of implementation that you are disposing of a part of a legal entity and want to isolate the assets and liabilities for that entity.

Implementing multiple balancing segments requires every journal entry that is not balanced by division or business unit, to generate balancing lines. You cannot change to multiple balancing segments after you begin using the ledger because your historical data is not balanced by the new balancing segments. Restating historical data must be done at that point.

If your enterprise regularly spins off businesses or holds managers accountable for utilization of assets, identify the business with a balancing segment value. If you account for each legal entity in a separate ledger, no requirement exists to identify the legal entity with a balancing segment value.

While transactions that cross balancing segments don't necessarily cross legal entity boundaries, all transactions that cross legal entity boundaries must cross balancing segments. If you make an acquisition or are preparing to dispose of a portion of your enterprise, you may want to account for that part of the enterprise in its own balancing segment even if the portion is not a separate legal entity. If you do not map legal entities sharing the same ledger to balancing segments, you cannot distinguish them using intercompany functionality or track individual equity.

Legal Entity and Its Relationship to Consolidation Rules

In Oracle Fusion Applications you can map legal entities to balancing segments and then define consolidation rules using your balancing segments. You are creating a relationship between the definition of your legal entities and their role in your consolidation.

Legal Entity and Its Relationship to Intercompany Transactions

Use Oracle Fusion Intercompany feature to create intercompany entries automatically across your balancing segments. Intercompany processing updates legal ownership within the enterprise's groups of legal entities. Invoices or journals are created as needed. To limit the number of trading pairs for your enterprise, set up intercompany organizations and assign then to your authorized legal entities. Define processing options and intercompany accounts to use when creating intercompany transactions and to assist in consolidation elimination entries. These accounts are derived and automatically entered on your intercompany transactions based on legal entities assigned to your intercompany organizations.

Intracompany trading, in which legal ownership isn't changed but other organizational responsibilities are, is also supported. For example, you can track assets and liabilities that move between your departments within your legal entities by creating departmental level intercompany organizations.

> **Tip:** In the Oracle Fusion Supply Chain applications, you can model intercompany relationships using business units, from which legal entities are derived.

Legal Entity and Its Relationship to Worker Assignments and Legal Employer

Legal entities that employ people are called legal employers in the Oracle Fusion Legal Entity Configurator. You must enter legal employers on worker assignments in Oracle Fusion HCM.

Legal Entity and Payroll Reporting

Your legal entities are required to pay payroll tax and social insurance such as social security on your payroll. In Oracle Fusion Applications, you can register payroll statutory units to pay and report on payroll tax and social insurance for your legal entities. As the legal employer, you might be required to pay payroll tax, not only at the national level, but also at the local level. You meet this obligation by establishing your legal entity as a place of work within the jurisdiction of a local authority. Set up legal reporting units to represent the part of your enterprise with a specific legal reporting obligation. You can also mark these legal reporting units as tax reporting units, if the legal entity must pay taxes as a result of establishing a place of business within the jurisdiction.

Related Topics

- Creating Legal Entities in the Enterprise Structures Configurator: Points to Consider

Manage Legal Entity HCM Information

HCM Organization Models: Examples

These examples illustrate different models for human capital management (HCM) organizations that include a legislative data group (LDG).

The example includes LDGs, which aren't organization classification, to show how to partition payroll data by associating them with a payroll statutory unit.

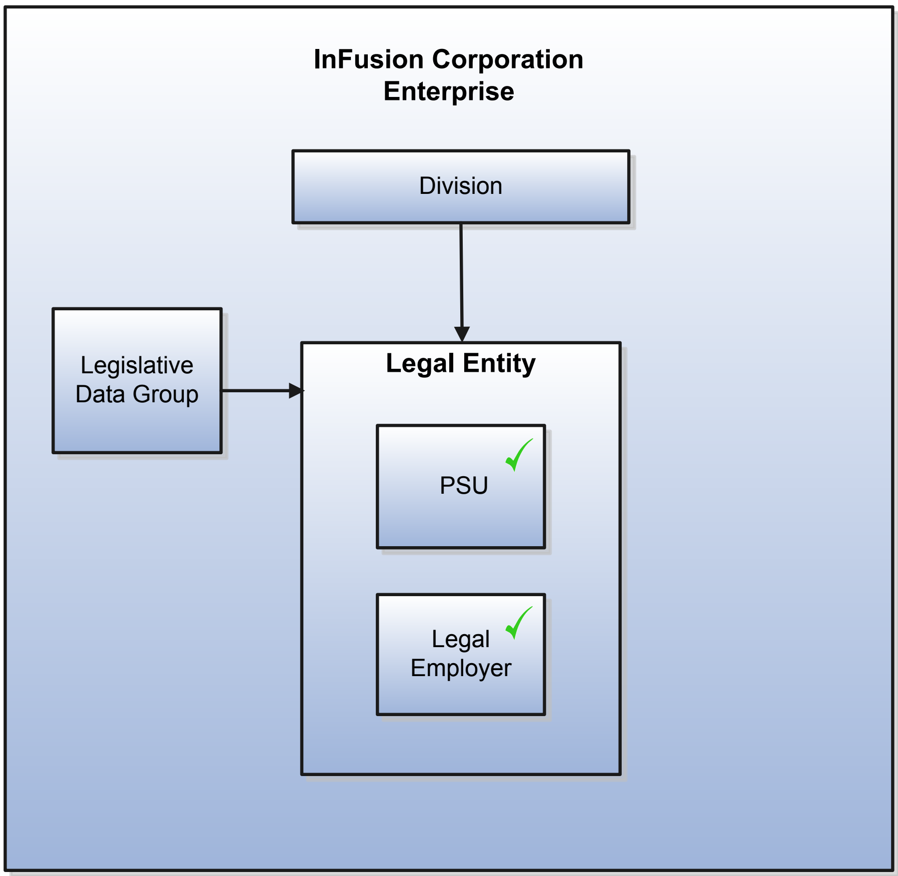
Simple Configuration

This example illustrates a simple configuration that does not include any tax reporting units.

Note the following:

- The legal employer and payroll statutory units are the same, sharing the same boundaries.
- Reporting can only be done at a single level. Countries such as Saudi Arabia and the United Arab Emirates (UAE) might use this type of model, as these countries report at the legal entity level.

This figure illustrates a simple configuration where the enterprise has only one legal entity, which is both a payroll statutory unit and a legal employer.



Multiple Legal Employers and Tax Reporting Units

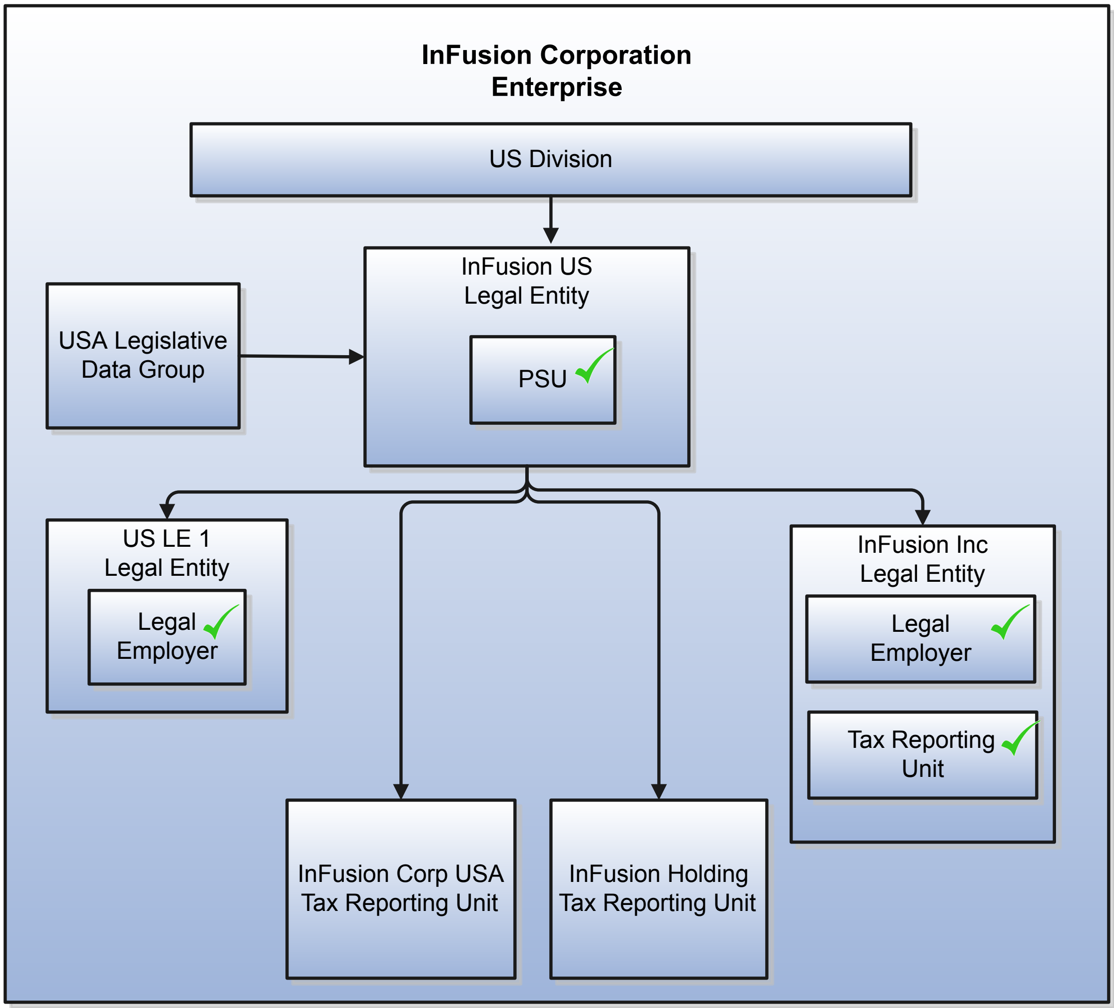
This example illustrates a more complex configuration. In this enterprise, you define one legal entity, InFusion US as a payroll statutory unit with two separate legal entities, which are also legal employers. This model shows multiple legal employers that are associated with a single payroll statutory unit. Tax reporting units are always associated with a specific legal employer (or employers) through the payroll statutory unit.

The implication is that payroll statutory reporting boundaries vary from human resources (HR) management, and you can categorize the balances separately by one of the following:

- Payroll statutory unit
- Legal employer
- Tax reporting unit

This configuration is based on tax filing requirements, as some tax-related payments and reports are associated with a higher level than employers. An example of a country that might use this model is the US.

This figure illustrates an enterprise that has one payroll statutory unit and multiple legal employers and tax reporting units.

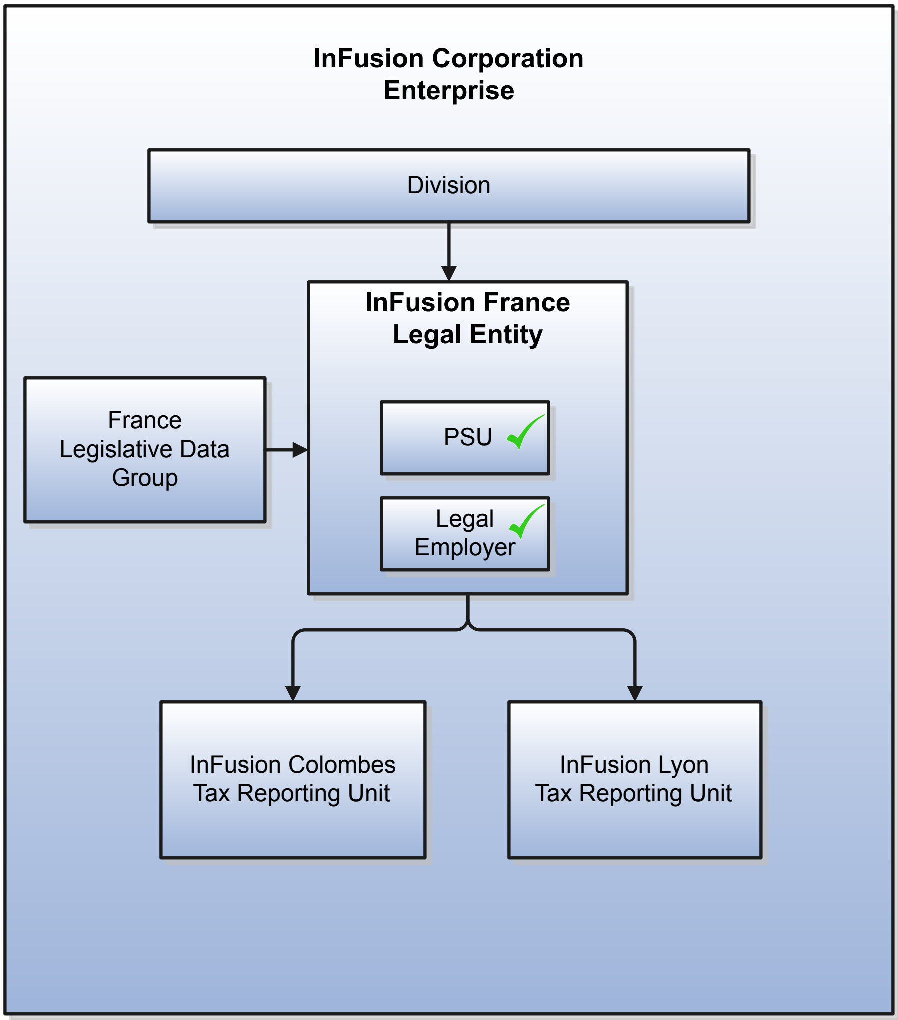


One Payroll Statutory Unit and Two Tax Reporting Units

This model makes no distinction between a legal employer and a payroll statutory unit. You define tax reporting units as subsidiaries to the legal entity.

In this enterprise, legal entity is the highest level of aggregation for payroll calculations and reporting. Statutory reporting boundaries are the same for both payroll and HR management. An example of a country that might use this model is France.

This figure illustrates an example of an organization with one legal entity. The legal entity is both a legal employer and a payroll statutory unit and that has two tax reporting units.



One Payroll Statutory Unit with Several Tax Reporting Units

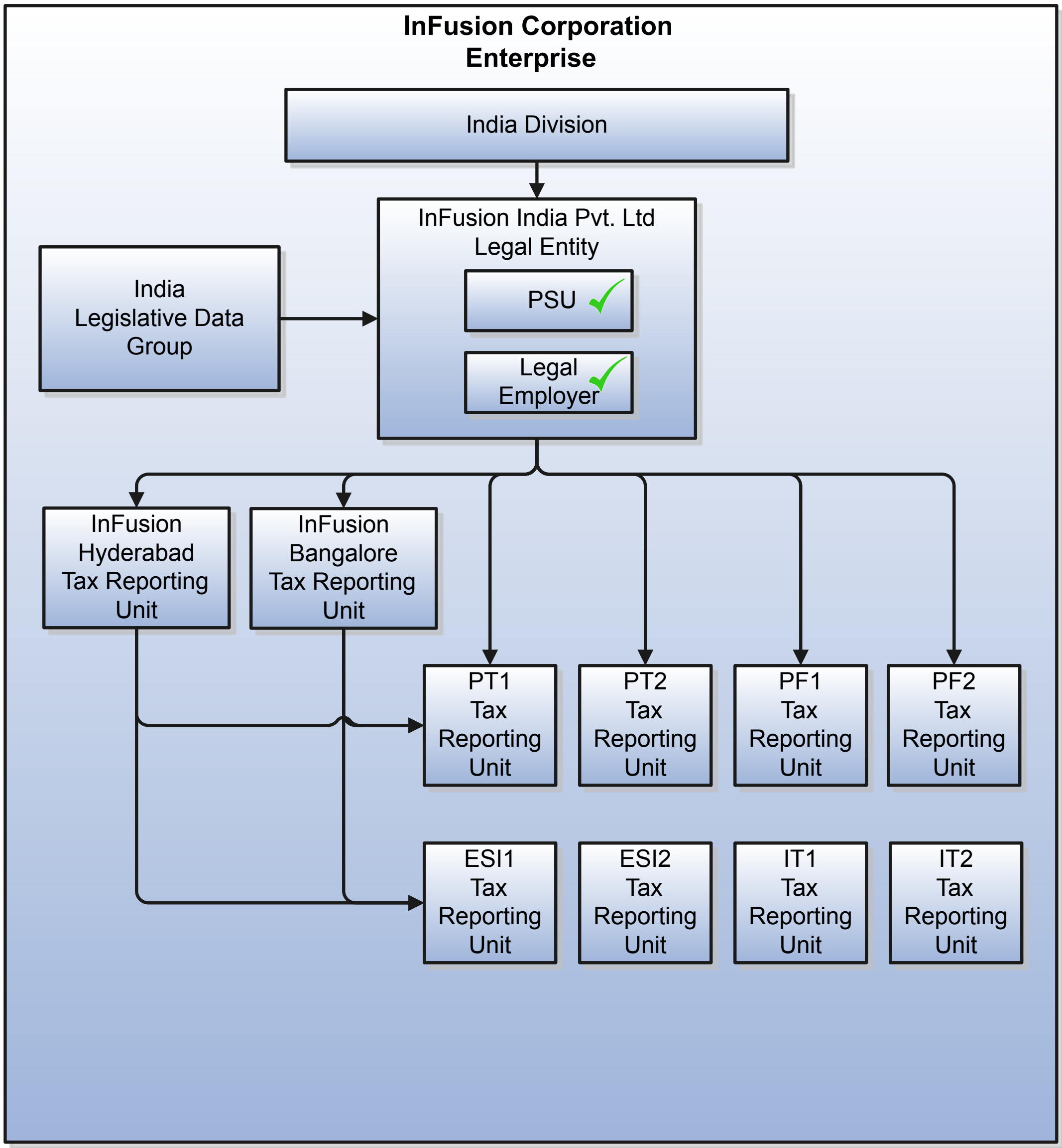
In this model, the enterprise has one legal entity. Legal employers and tax reporting units are independent from each other within a payroll statutory unit, because there is no relationship from a legal perspective. Therefore, you can run reporting on both entities independently.

Using this model, you wouldn't typically:

- Report on tax reporting unit balances within a legal employer
- Categorize balances by either or both organizations, as required

An example of a country that might use this model is India.

This figure illustrates an enterprise with one legal entity that is a payroll statutory unit and a legal employer. The tax reporting units are independent from the legal employer.



Multiple Payroll Statutory Units with Several Tax Reporting Units

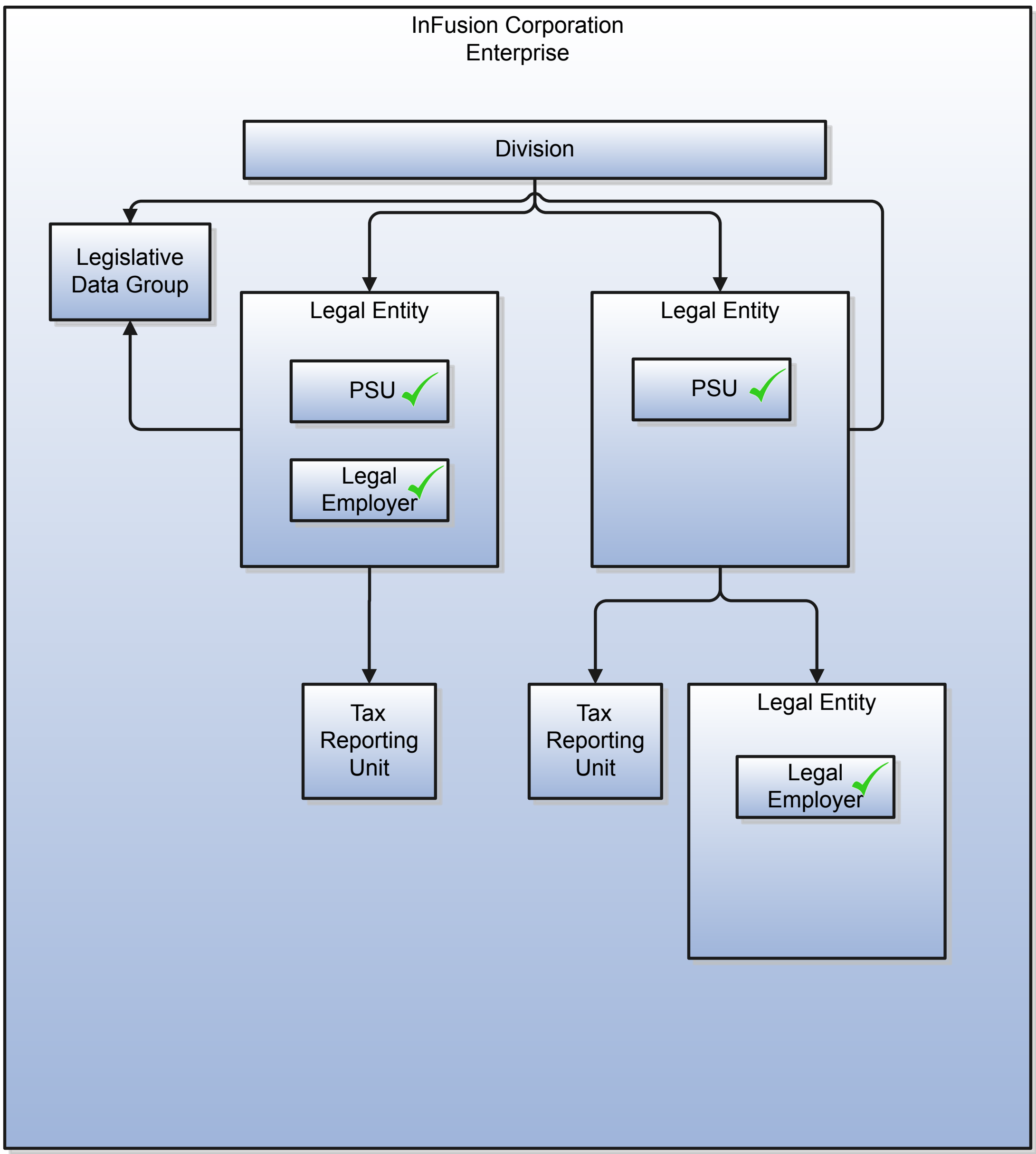
In this model, the enterprise has two legal entities. The legal employers and tax reporting units are independent from each other within a payroll statutory unit, because there is no relationship from a legal perspective. Therefore, you can run reporting on both entities independently.

Using this model, you wouldn't typically:

- Report on tax reporting unit balances within a legal employer
- Categorize balances by either or both organizations, as required

An example of a country that might use this model is the United Kingdom (UK).

This figure illustrates an enterprise with two legal entities, and legal employers and tax reporting units are independent from each other.



Payroll Statutory Units, Legal Employers, and Tax Reporting Units: How They Work Together

When you set up legal entities, you can identify them as legal employers and payroll statutory units, which makes them available for use in Oracle Fusion Human Capital Management (HCM). Depending on how your organization is structured, you may have only one legal entity that is also a payroll statutory unit and a legal employer, or you may have multiple legal entities, payroll statutory units, and legal employers.

Legal Employers and Payroll Statutory Unit

Payroll statutory units enable you to group legal employers so that you can perform statutory calculations at a higher level, such as for court orders or for United Kingdom (UK) statutory sick pay. In some cases, a legal employer is also a payroll statutory unit. However, your organization may have several legal employers under one payroll statutory unit. A legal employer can belong to only one payroll statutory unit.

Payroll Statutory Units and Tax Reporting Units

Payroll statutory units and tax reporting units have a parent-child relationship, with the payroll statutory unit being the parent.

Tax Reporting Units and Legal Employers

Tax reporting units are indirectly associated with a legal employer through the payroll statutory unit. One or more tax reporting units can be used by a single legal employer, and a tax reporting unit can be used by one or more legal employers. For example, assume that a single tax reporting unit is linked to a payroll statutory unit. Assume also that two legal employers are associated with this payroll statutory unit. In this example, both legal employers are associated with the single tax reporting unit.

Use the Manage Legal Reporting Unit HCM Information task to designate an existing legal reporting unit as a tax reporting unit. If you create a new legal reporting unit that belongs to a legal employer (that is not also a payroll statutory unit), you select a parent payroll statutory unit and then, when you run the Manage Legal Reporting Unit HCM Information task, you designate it as a tax reporting unit and select the legal employer.

Related Topics

- What's a tax reporting unit?

FAQs for Manage Legal Entity HCM Information

What's a legal employer?

A legal employer is a legal entity that employs workers. You define a legal entity as a legal employer in the Oracle Fusion Legal Entity Configurator.

The legal employer is captured at the work relationship level, and all assignments within that relationship are automatically with that legal employer. Legal employer information for worker assignments is also used for reporting purposes.

What's a payroll statutory unit?

Payroll statutory units are legal entities that are responsible for paying workers, including the payment of payroll tax and social insurance. A payroll statutory unit can pay and report on payroll tax and social insurance on behalf of one or many legal entities, depending on the structure of your enterprise. For example, if you are a multinational, multiple company enterprise, then you register a payroll statutory unit in each country where you employ and pay people. You can optionally register a consolidated payroll statutory unit to pay and report on workers across multiple legal employers within the same country. You associate a legislative data group with a payroll statutory unit to provide the correct payroll information for workers.

Manage Departments

Cost Centers and Departments: Explained

The two important components to be considered in designing your enterprise structure are cost centers and departments.

A cost center represents the smallest segment of an organization for which you collect and report costs. A department is an organization with one or more operational objectives or responsibilities that exist independently of its manager and has one or more workers assigned to it.

Cost Centers

A cost center represents the destination or function of an expense rather than the nature of the expense which is represented by the natural account. For example, a sales cost center indicates that the expense goes to the sales department.

A cost center is generally attached to a single legal entity. To identify the cost centers within a chart of accounts structure use one of these two methods:

- Assign a cost center value in the value set for each cost center. For example, assign cost center values of PL04 and G3J1 to your manufacturing teams in the US and India. These unique cost center values allow easy aggregation of cost centers in hierarchies (trees) even if the cost centers are in different ledgers. However, this approach requires defining more cost center values.
- Assign a balancing segment value with a standardized cost center value to create a combination of segment values to represent the cost center. For example, assign the balancing segment values of 001 and 013 with cost center PL04 to represent your manufacturing teams in the US and India. This creates 001-PL04 and 013-PL04 as the cost center reporting values. The cost center value of PL04 has a consistent meaning. This method requires fewer cost center values to be defined. However, it prevents construction of cost center hierarchies using trees where only cost center values are used to report results for a single legal entity. You must specify a balancing segment value in combination with the cost center values to report on a single legal entity.

Departments

A department is an organization with one or more operational objectives or responsibilities that exist independently of its manager. For example, although the manager may change, the objectives do not change. Departments have one or more workers assigned to them.

A manager of a department is typically responsible for:

- Controlling costs within their budget
- Tracking assets used by their department
- Managing employees, their assignments, and compensation

The manager of a sales department may also be responsible for meeting the revenue targets.

The financial performance of departments is generally tracked through one or more cost centers. In Oracle Fusion Applications, departments are defined and classified as Department organizations. Oracle Fusion Human Capital Management (HCM) assigns workers to departments, and tracks the headcount at the departmental level.

The granularity of cost centers and their relationship to departments varies across implementations. Cost center and department configuration may be unrelated, identical, or consist of many cost centers tracking the costs of one department.

Department Classifications: Points to Consider

A department can be classified as a project organization, sales and marketing organization, or cost organization.

Oracle Fusion Human Capital Management (HCM) uses trees to model organization hierarchies. It provides predefined tree structures for department and other organizational hierarchies that can include organizations with any classification.

Project Organization

Classify departments as a project owning organization to enable associating them with projects or tasks. The project association is one of the key drivers for project access security.

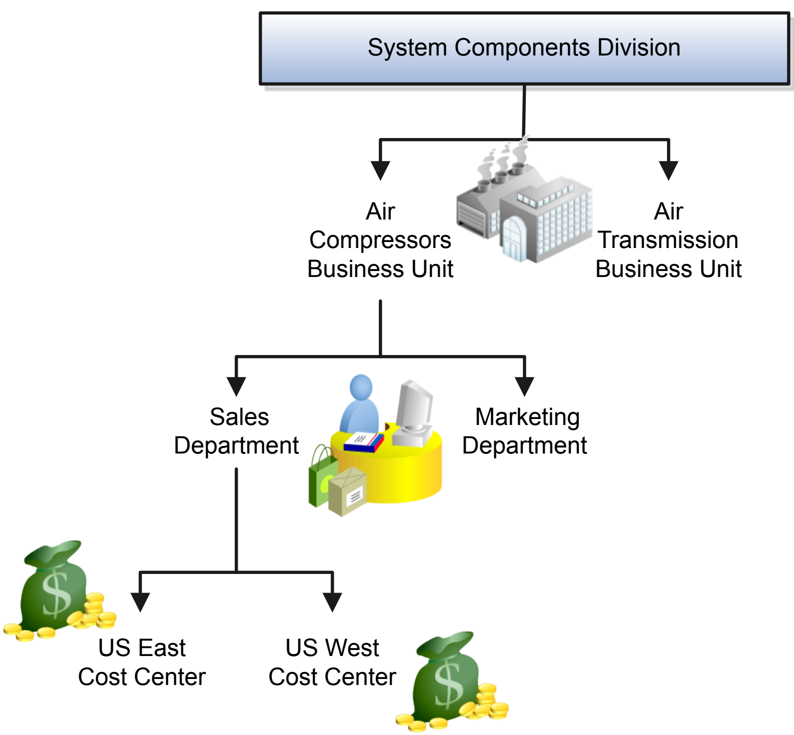
In addition, you must classify departments as project expenditure organizations to enable associating them to project expenditure items. Both project owning organizations and project expenditure organizations can be used by Oracle Fusion Subledger Accounting to derive accounts for posting Oracle Fusion Projects accounting entries to Oracle Fusion General Ledger.

Sales and Marketing Organization

In Oracle Sales Cloud, you can define sales and marketing organizations. Sales organization hierarchies are used to report and forecast sales results. Salespeople are defined as resources assigned to these organizations.

In some enterprises, the HCM departments and hierarchies correspond to sales organizations and hierarchies. Examining the decision on how to model sales hierarchies in relationship to department hierarchies when implementing Customer Relationship Management to eliminate any possible redundancy in the definition of the organizations is important.

The following figure illustrates a management hierarchy, in which the System Components Division tracks its expenses in two cost centers, Air Compressors and Air Transmission. At the department level, two organizations with a classification of Department are defined, the Marketing Department and Sales Department. These two departments can be also identified as a Resource Organizations, which enable assigning resources, such as salespeople, and other Oracle Sales Cloud specific information to them. Each department is represented in the chart of accounts by more than one cost center, enabling granular as well as hierarchical reporting.



Cost Organization

Oracle Fusion Costing uses a cost organization to represent a single physical inventory facility or group of inventory storage centers, for example, inventory organizations. This cost organization can roll up to a manager with responsibility for the cost center in the financial reports.

A cost organization can represent a costing department. Consider this relationship when determining the setup of departments in HCM. No system dependencies are required for these two entities, cost organization and costing department, to be set up in the same way.

Manage Job

Jobs: Explained

Jobs are typically used without positions by service industries where flexibility and organizational change are key features. As part of your initial implementation, you specify whether to use jobs and positions, or only jobs.

Basic Details

Basic details for a job include an effective start date, a job set, a name, and a code.

A job code must be unique within a set. Therefore, you can create a job with the code DEV01 in the US set and another job with the same code in the UK set. However, if you create a job with the code DEV01 in the Common set, then you can't create a job with the same code in any other set.

Benchmark Information

You can identify a job as being a benchmark job. A benchmark job represents other jobs in reports and salary surveys. You can also select the benchmark for jobs. Benchmark details are for informational purposes only.

Progression Information

A progression job is the next job in a career ladder. Progression jobs enable you to create a hierarchy of jobs and are used to provide the list of values for the Job field in the Promote Worker and Transfer Worker tasks.

The list of values includes the next three jobs in the progression job hierarchy. For example, assume that you create a job called Junior Developer and select Developer as the progression job. In the Developer job, you select Senior Developer as the progression job. When you promote a junior developer, the list of values for the new job will include Developer and Senior Developer. You can select one of these values, or select another one.

Jobs and Grades

You can assign grades that are valid for each job. If you're using positions, then the grades that you specify for the job become the default grades for the position.

Evaluation Criteria

You can define evaluation criteria for a job, including the evaluation system, a date, and the unit of measure for the system. The Hay system is the predefined evaluation system that's available. An additional value of Custom is included in the list of values for the Evaluation System field, but you must add your own criteria and values for this system.

Uploading Jobs Using a Spreadsheet

If you have a list of jobs already defined for your enterprise, you can upload them from a spreadsheet.

To use this option:

1. Download a spreadsheet template.
2. Add your job information to the spreadsheet.
3. Upload directly to your enterprise configuration.

   You can upload the spreadsheet multiple times to accommodate revisions.

Related Topics

- Job and Position Lookups: Explained
- Using Desktop Integrated Excel Workbooks: Points to Consider
- Enforcing Grades at Assignment Level: Points to Consider

Jobs: Example

Jobs are typically used without positions by service industries where flexibility and organizational change are key features.

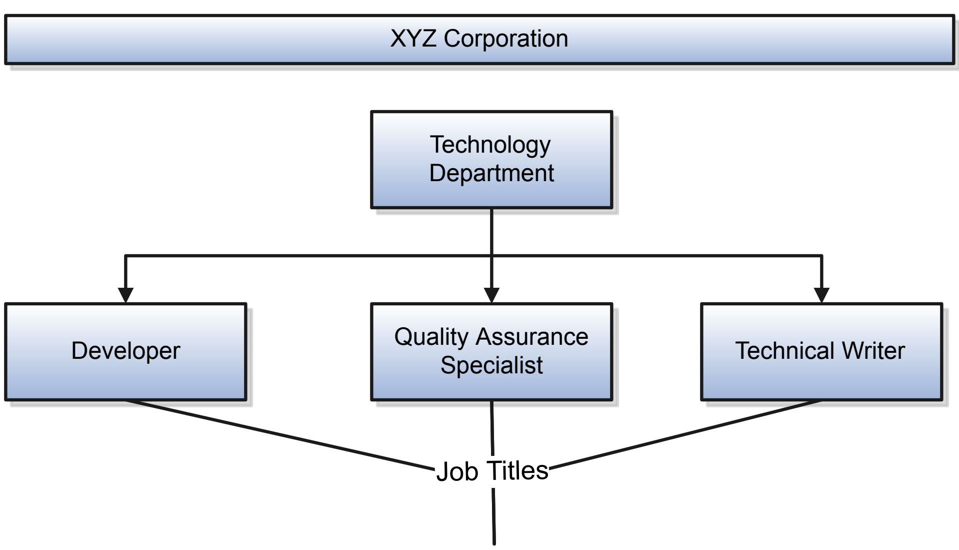
Software Industry

For example, XYZ Corporation has a director over the departments for developers, quality assurance, and technical writers.

- Recently, three developers have left the company.
- The director decides to redirect the head count to other areas.
- Instead of hiring all three back into development, one person is hired to each department, quality assurance, and technical writing.

In software industries, the organization is fluid. Using jobs gives an enterprise the flexibility to determine where to use head count, because the job only exists through the person performing it. In this example, when the three developers leave XYZ Corporation, their jobs no longer exist, therefore the corporation has the flexibility to move the headcount to other areas.

This figure illustrates the software industry job setup.



Define Project Enterprise Labor Resources

Project Enterprise Labor Resource Components: How They Work Together

A project enterprise labor resource is a resource that you can assign to multiple projects. If you manage resource availability and staffing in Oracle Fusion Project Resource Management, use project enterprise labor resources to fulfill project resource requests.

Consider the following attributes and options when creating a resource in the Create Project Enterprise Resources window.

- Resource details
- Personal details
- Resource Management details
- Rate details

Resource Details

Resource details include the following attributes:

- **Type**

  You can create both labor and expense type resources to add to a project.

  Select the **Create from expenditure type** option to create an expense resource from an expenditure type in Project Financial Management.
- **Create From HCM Person**

  Select this option to create a project enterprise labor resource from an employee or contingent worker in Oracle Fusion HCM.

  > **Note:** The employee or contingent worker must have a unique e-mail in a valid format and an active primary assignment in HCM.
- **From Date** and **To Date**

  The resource's **From Date** is the date from which you can assign the resource to a project. The **To Date** is the last date that you can assign the resource to a project.
- **Request User Account** and **Provision Project Roles**

  Select these options to request a user account for a new resource and provision the resource with default role assignments. You can request a user account only for a resource who isn't associated with an employee or contingent worker in HCM.

  Click **Activate User Account** to request a user account for an existing resource. This action provisions the default role assignments for the resource and sends the resource an e-mail notification.

Personal Details

Personal details include the following attributes:

- **Calendar**

  Resource calendars are used to:

  - Determine resource availability
  - Schedule tasks
  - Assign resources to tasks
  - Calculate cost and bill amounts based on hourly rates

  Daily work on a resource's calendar is measured in hours per day. Task duration is measured in days.

  You set up calendars to assign to projects and resources, or use the predefined calendar with eight hours per day and five days per week with no holidays. You select the default calendar on the Define Project Management Implementation Options page.

- **Primary Project Role**

  The primary project role is the role that a resource most often fulfills on a project. Available values are based on project roles in Oracle Fusion Project Management. The default value is Project Team Member.

- **Resume Attachments**

  The application searches the text in a resource resume to find matches for keywords that are entered as requirements on a project resource request. The keyword occurrences are used in the resource qualification score calculation that indicates how well a resource meets the requested qualifications.

Resource Management Details

Resource Management details consist of the following attributes:

- **Manage Resource Availability and Staffing**

  Select this option for the resource to be eligible to fulfill project resource requests in Oracle Fusion Project Resource Management.

- Resource Pool

  You must select a resource pool if you select the **Manage resource availability and staffing** option. The default resource pool value is Resources with No Pool Membership.

- **Membership From Date**

  A resource's first pool membership from date must be equal to or later than the resource from date.

  Tip: Manage pool memberships for a resource on the Manage Resource Pool Memberships window.

Rate Details

The rate types on a resource definition are:

- **Cost Rate**: The rate for a unit of work that determines the cost for a resource on a project. To calculate the resource cost amount, the application multiplies the resource's labor effort in hours on the project by the resource's cost rate.
- **Bill Rate**: The rate for a unit of work that determines the invoice or revenue recognized amount for a resource on a project. To calculate the bill amount for a resource on a project, the application multiplies the labor effort by the project resource bill rate.

When you add a planning resource to a project, the application copies the resource cost and bill rates to the project if the resource rate currency is the same as the project currency.

You can edit planning resource rates directly on the project. You can edit rates for assigned resources, or resources who have pending assignment adjustments, directly on the assignment. The new rates are reflected in the labor cost and bill amounts on the resource's tasks. Rate changes that you make on the project or assignment don't affect the rates on the resource definition.

Related Topics

- Project and Resource Calendars: Explained
- How can I attach a resume to my resource profile?

Manage Employees and Contingent Workers for Project Resource Management

Managing Employees and Contingent Workers for Project Resource Management: Procedure

You can create employees or contingent workers as users, update their talent profiles, then enable them as managed project enterprise labor resources to use in Oracle Fusion Project Resource Management.

> **Note:** If you are using a full implementation of Oracle Fusion Human Capital Management, employees and contingent workers are already set up and you can skip these steps.

To create an employee, contingent worker, or both as a user:

1. Open the Setup and Maintenance work area, and go to the **Manage Users** task.
2. Click the **Manager Users** link.
3. On the Search Person page, click the **Create** icon.
4. On the Create User page, enter the last name, e-mail, and hire date of the employee or contingent worker.
5. Enter the personal details of the employee or contingent worker.
6. Optionally enter user name.

   If you select the option to send the user name and password, the user name and password are sent to the user's primary e-mail. You can send this information only once.

   If you deselect this option, you can send the user name and password to the user later by running the Send User Name and Password E-Mail Notification process. If the user's e-mail account isn't configured, then the user name and password are sent to the user's manager.

7. In the **Person Type** field, select Employee, Contingent Worker, or Employee and Contingent Worker. Enter the remaining details in the Employment Information section.
8. Select the resource role, reporting manager, and organization.
9. Search for a role, then click **Add Role** to provision the role manually. Users keep the manually added roles until all their assignments are terminated or you deprovision the role.

   If you autoprovision roles, then users inherit roles that match their assignments and the assignments appear in the Role Requests table. Similarly, they are removed from roles that don't match their assignments.
10. Click **Save and Close**. The application immediately sends Oracle Identity Management the request to create the user account and provision the roles.

Manage Project Enterprise Labor Resource Maintenance Conditions

Project Enterprise Labor Resources: How They're Automatically Created and Maintained

Run the Maintain Project Enterprise Labor Resources process to:

- Create resources from employees or contingent workers
- Remove resource availability for staffing from employees or contingent workers
- Update the resource To Date for terminated employees or contingent workers
- Maintain the resource search index

Settings That Affect the Maintain Project Enterprise Labor Resources Process

Create and maintain project enterprise labor resources by defining:

- Conditions that specify the employees and contingent workers in Oracle Fusion Human Capital Management (HCM) to create as resources in Oracle Fusion Project Portfolio Management
- Resource attribute values for each condition, such as the resource calendar and primary project role, to assign to the new resources
- The process order for each condition to determine the order in which the Maintain Project Enterprise Labor Resources process creates resources

The following table lists the criteria that the process uses to select employees and contingent workers to create as project enterprise labor resources. You define the criteria when you create a condition.

Selection Criteria	Description
Person Type	Create resources for people with the selected person types. Available person types are employees, contingent workers, or both employees and contingent workers.
Select people based on job	Create resources for people with specific jobs. **Caution:** If you don't select job criteria for this condition, the process creates resources for all eligible people based only on the person type.
Jobs	The jobs that the process uses as selection criteria if you're creating resources for people with specific jobs.

The following table lists the attributes that the process assigns to resources that it creates.

Attribute	Description
• **Calendar** • **Primary Project Role** • **Cost Rate** and currency • **Bill Rate** and currency	Specify a value for each attribute.
Manage resource availability and staffing option	If you select **Manage resource availability and staffing**: • The resource is eligible to fulfill project resource requests. • The process adds the resource to the Resources with No Pool Membership resource pool. The project application administrator can move the resource to a different pool on the Manage Resource Pools page or Manage Project Enterprise Resources page.

• From Date
• To Date
	The process assigns dates in the following circumstances to indicate when a resource is active:
	• New resources:
	  ◦ For the resource **From Date**, the process uses the hire date for an employee and placement date for a contingent worker.
	  ◦ The process doesn't assign a **To Date** to new resources.
	• Existing resources if a termination date exists in HCM:
	  ◦ If the resource doesn't have a **To Date**, the process uses the termination date as the resource **To Date**.
	  ◦ If the resource has a **To Date**, the process updates the **To Date** only if the termination date is earlier than the **To Date**.

How Resources are Created

Click **Maintain Project Enterprise Labor Resources** on the Manage Project Enterprise Labor Resource Maintenance Conditions page to run the process. Select one or both of the following process options in the Maintain Project Enterprise Labor Resources window:

- **Create and Update Resources**: Creates and updates project enterprise labor resources from employees or contingent workers who meet the selection criteria for a condition.

  When you select the **Create and Update Resources** option, the process:

  - Includes all conditions on the Maintain Project Enterprise Labor Resources Process Conditions page each time the process runs.
  - Processes conditions in ascending order of the process order value. Multiple conditions with the same process order value are processed in ascending alphabetic order of the condition name.
  - Lists the process exceptions in the Last Process Details region on the Manage Project Enterprise Labor Resource Maintenance Conditions page.

- **Remove Resource Availability**: Disables the option to manage resource availability and staffing for all project enterprise labor resources who are employees or contingent workers and have no active primary assignment in HCM.

  When you select the **Remove Resource Availability** option, the process:

  - Disregards resources who aren't employees or contingent workers when determining if a resource has an active primary assignment in HCM.

- Sends resource pool owners a notification when resources in their pools are no longer eligible to fulfill project resource requests.

The Maintain Project Enterprise Labor Resources process launches the Maintain Project Resource Search Index Job Set process to update the search index that enables resources to appear on the Search and Evaluate Resources page when searching for resources to fulfill project resource requests.

> **Note:** You aren't required to run the Maintain Project Enterprise Labor Resources process before you update the search index. You can run the Maintain Project Resource Search Index Job Set separately from the Scheduled Processes page.

Managing Project Enterprise Labor Resource Maintenance Conditions: Procedure

You can create project enterprise labor resources from HCM persons by defining a project enterprise labor resource maintenance condition and submitting the Maintain Project Enterprise Labor Resources process. The process creates project enterprise labor resources from the employees and contingent workers who match the maintenance condition. The records are processed in ascending order based on the process order value. If multiple conditions have the same process order value, then records are processed in ascending alphabetic order based on the condition name.

The maintenance condition includes:

- The person type and optionally, specified jobs.
- Attributes that the project enterprise resources are assigned on creation.

To define a project enterprise labor resource maintenance condition:

1. Open the Setup and Maintenance work area, and go to the **Manage Project Enterprise Labor Resource Maintenance Conditions** task.
2. Click the **Manage Project Enterprise Labor Resource Maintenance Conditions** link.
3. Click the **Create** icon.
4. Enter a name for the condition in the **Name** field.
5. Enter a value in the **Process Order** field.

   > **Note:** If a project enterprise labor resource doesn't already exist for that person, then the process creates a resource for the condition with the process order value of one. The process doesn't create more than one resource for the same person even if subsequent conditions apply to the person.

6. Optionally enter a description.
7. Select a person type from the **Person Type** choice list. The person type can be employee, contingent worker, or both types.
8. To create resources from HCM persons with specific jobs, select the **Select people based on job** check box. If you don't select the option, the project enterprise labor resources are created based only on the person type.
   - Select a job from the **Jobs** choice list.
   - Click **Add** to add another job.
9. Select the **Manage resource availability and staffing** check box to create managed project enterprise resources.
   - Managed project enterprise labor resources are managed in Oracle Fusion Project Resource Management.
   - The resources are added to the **Resources with No Pool Membership** resource pool. The project application administrator can move the resource to a different pool on the Manage Resource Pools page or Manage Project Enterprise Resources page.

10. Select the resource calendar from the **Calendar** choice list. A resource calendar defines the work schedule for project enterprise labor resources, and includes working days and hours, exceptions, and holidays. This calendar will be assigned to all resources that match the project enterprise labor resource maintenance condition.
11. Select the primary project role to assign resources from **Primary Project Role**. For example, by selecting Oracle Database Administrator, you can create project enterprise labor resources who are Oracle Database Administrators.
12. Select the currency and enter the cost rate in the **Cost Rate** fields.
13. Select the currency and enter the bill rate in the **Bill Rate** fields.
14. Click **Save and Close** on the Create Condition page.
15. On the Manage Project Enterprise Labor Resource Maintenance Conditions page, click **Maintain Project Enterprise Labor Resources** to submit the process of the same name. Run the process to:
    - Create resources.
    - Remove resource availability for staffing.
    - Maintain the resource search index.

    The following table describes the process options that you can select:

Option	Description
Create and Update Resources	Create project enterprise labor resources from employees or contingent workers based on selection criteria and attributes defined in maintenance conditions.
Remove resource availability	Disable the manage resource availability and staffing option for resources who are employees or contingent workers with no active HCM primary assignment. ◦ Resources who aren't employees or contingent workers are ignored when determining if a resource has an active primary assignment in Oracle Fusion HCM. ◦ Resource pool owners receive a notification when resources in their pools are no longer eligible to fulfill project resource requests.

    Note: If you select the remove resource availability option, then the resources won't be able to fulfill project resource requests.

16. Click **Submit**. You can run the Maintain Project Enterprise Labor Resources process from either the Manage Project Enterprise Labor Resource Maintenance Conditions page or Scheduled Processes page.

Manage Resource Pools

Resource Pools: Explained

A resource pool is a logical group of resources organized in a hierarchy for purposes of staffing and managing resources, and reporting on utilization.

Resource managers use resource pools to:

- Search for resources to fulfill project resource requests.
- Review projected utilization on the Resource Manager Dashboard.

Aspects of resource pools explained here include:

- Predefined resource pools

- Resource pool memberships
- Resource pool hierarchies
- Resource pool owners

Predefined Resource Pools

The following pools are predefined:

- **All Resources**

  This pool is always at the top of the resource pool hierarchy.
- **Resources with No Pool Memberships**

  This is the default pool for new resources.
- **Inactive Resource Pool Memberships**

  This pool contains resources for the time period that the resources aren't eligible to fulfill project resource requests. For example, a resource who is on a vacation or leave of absence can be a member of this pool. Resources in this pool aren't available for staffing.

You can't move or delete the predefined resource pools.

Resource Pool Memberships

All managed project enterprise labor resources are members of a resource pool. Resources can belong to only one pool on any given date.

The pool membership **From Date** and **To Date** indicate the time period that a resource is a member of a resource pool. Pool membership dates for a resource must be within the **From Date** and **To Date** on the resource definition.

> **Caution:** Pool membership dates for a resource must be contiguous and can't overlap.

If a resource becomes ineligible for staffing, then the application:

- Sets the **To Date** of the resource's current pool membership as of the day the resource becomes ineligible for staffing.
- Sets the **From Date** as of the following day for the resource's membership in the **Inactive Resource Pool Memberships** pool.

Resource Pool Hierarchies

Use the Manage Resource Pools page to build a resource pool hierarchy that reflects how the organization manages and reports on resources. For example, resource pools can group resources in a hierarchy by geographic locations, cost centers, skill sets, or primary project roles.

You can revise the resource pool hierarchy, such as moving a child pool from a parent pool in one hierarchy to a parent pool in a different hierarchy.

To delete a resource pool, you must first move all of its resource pool memberships to a different pool. To delete a parent pool, all child resource pools must have no resource pool memberships.

> **Caution:** Deleting a parent pool also deletes the child pools.

Resource Pool Owners

You can assign any project enterprise labor resource as a resource pool owner. Typically resource managers own the resource pools.

When a resource manager searches for resources to fulfill a request, by default the application searches for resources who are members of:

- Resource pools that the resource manager owns.
- Resource pools that are children of resource pools that the resource manager owns.

However, resource managers can search for qualified resources in any resource pool.

Managing Resource Pools: Procedure

Build resource pools to organize managed project enterprise labor resources in hierarchical relationships. You group resources logically for the purposes of staffing and managing resources, and reporting on utilization.

You can review the resource pool details, change the resource pool hierarchy, and move resources from one resource pool to another.

1. Open the Setup and Maintenance work area, and go to the **Manage Resource Pools** task.
2. Click the **Manage Resource Pools** link.
3. On the Manage Resource Pools page, click **Expand** next to the **All Resources** folder.
    - The pools named **All Resources** and **Resources with No Pool Memberships** are predefined. The **All Resources** pool is always at the top of the resource pool hierarchy.
    - The **Resources with No Pool Memberships** pool is the default pool for new resources.
4. To view the details of a resource pool:
    a. Place your cursor over a resource pool to view the name of the pool owner.
    b. Select the resource pool to view the members of the resource pool in the Resource Pool Members section.
5. Resource pool hierarchies represent how the organization manages and reports on resources. For example, resource pools can group resources in a hierarchy by geographic locations, cost centers, skill sets, or primary project roles. To change the resource pool hierarchy by moving a pool to another hierarchy:
    a. Select the resource pool.
    b. Click **Move Resource Pool**. You can also drag and drop a pool from one hierarchy to another.
    c. In the Move Resource Pool secondary window, select from the **Target Parent Resource Pool** choice list.
    d. Click **Save and Close**.
6. To move a resource to another resource pool:
    a. Select the resource pool in the Resource Pool section.
    b. In the Resource Pool Members section, select the member.
    c. Click **Move Resources**. You can also drag and drop a member from one pool to another.
    d. In the Move Resources secondary window, select the target pool from the **Target Resource Pool** choice list.
    e. Click **Save and Close**.

Import Resource Pools and Memberships Process

The Import Resource Pools and Memberships process creates resource pools and resource pool memberships based on data from third-party applications that you load into the resource pools and resource pool memberships interface tables (PJR_RESOURCE_POOLS_INT and PJR_RESOURCE_POOL_MEMBERS_INT).

Once in the interface tables, the resource pool and resource pool membership details are validated and processed by the Import Resource Pools and Memberships process and any exceptions are reported in the output of that process.

Use the Resource Pools Interface macro-enabled Excel workbook template to prepare data for loading and importing, and ensure that your data conforms to the structure and format of the target application database tables. The workbook contains the following worksheets:

- Instructions and CSV Generation: Table-specific instructions, guidelines, formatted spreadsheets, and recommendations for preparing the data file for upload.
- PJR_RES_POOL_CREATE: Worksheet columns that represent table fields for the resource pool names, owners, parent resource pools, and additional remarks.
- PJR_RES_POOL_MEMBERS_CREATE: Worksheet columns that represent table fields for resource pool names, resources to add the resource pools, and the dates that the resources will be members of their assigned pools.

Note: Resource pools that you add members to on the PJR_RES_POOL_MEMBERS_CREATE worksheet must already exist.

After you prepare the data in the Resource Pools Interface Excel template, click the **Generate CSV File** button in the template to create worksheets to load to the interface tables. Optionally you can bypass the Excel template and manually create CSV files.

Load data into the interface tables and application database tables using one of these two methods:

- Run the Load Interface File and Import Resource Pools and Memberships job set to transfer the data file from your specified location to the interface table and import resource pool data from the interface into the database tables.
- Run the Load Interface File for Import process followed by the Import Resource Pools and Memberships process to separate the load and import steps.

For more information about file-based data import, see the File Based Data Import for Oracle Project Portfolio Management Cloud guide.

Run the load and import processes from the Scheduled Processes Overview page.

Parameters - Load Interface File for Import

Import Process

Select Import Resource Pools and Memberships.

Data File

Select the CSV file that contains resource pool and resource pool membership data to load.

Import Resource Pools and Memberships Execution Report

The Import Resource Pools and Memberships Execution report summarizes the number of processed, accepted, and rejected items encountered when you imported the resource pools and resource pool memberships. The report contains details for all requests that generated errors during the import process.

Review the error message details for each resource pool and fix the issues. Load the data that you fixed in the CSV file into the interface table again and resubmit the Import Resource Pools and Resource Pool Memberships process.

Related Topics

- External Data Integration Services for Oracle Cloud: Overview

Submit Process to Maintain Project Resource Search

Project Resource Search Index: How It's Maintained

The Maintain Project Resource Search Index job set consists of processes that facilitate efficient and rapid searching for qualified resources to fulfill project resource requests. The application uses the index to calculate Resource Qualification scores and filter counts during the search for resources, and to display resource details.

If a project resource request contains qualifications or keywords, then these actions depend on indexed resource data:

- Initiating a search for resources for a project resource request
- Modifying search criteria on the Search and Evaluate Resources page and conducting a new search
- Modifying the resource pools that the search uses
- Increasing the resource match thresholds for the Qualification or Available Capacity scores
- Selecting new search filters, such as competencies, languages, locations, project roles, and travel preferences
- Displaying resource details

Note: If a project resource request contains qualifications or keywords, then resource managers can't search for resources or view resource details if the search index isn't available. The search index isn't available if the Maintain Project Resource Search Index process fails, or when the process is running. However, if a project resource request doesn't contain qualifications or keywords, then the resource manager can search for and evaluate resources to fulfill the request based on resource availability, even if the search index isn't current or available.

How the Project Resource Search Index Is Maintained

You can run or schedule the Maintain Project Resource Search Index job set on the Scheduled Processes page. In addition, the Maintain Project Resource Search Index job set starts automatically after you run the Maintain Project Enterprise Labor Resources process.

The Maintain Project Resource Search Index job set starts the following processes to update the search index:

- Maintain Project Resource Qualification Index process

  Maintains the index of active qualifications, qualification proficiencies, and resume contents for project resources. A qualification is indexed if you run the process within the effective dates of the qualification.
- Maintain Project Resource Qualification Filters process

  Maintains the qualification filters and count of resources that have each qualification.
- Maintain Project Resource Single Attribute Filters process

  Maintains the filters for attributes for which a resource can have only one value, such as location and project role. Maintains the count of resources that have each attribute.

Indexing Resumes

The Maintain Project Resource Qualification Index process creates an index of the text in the latest resume in a resource's profile. The application compares the resume text to the keywords entered on a project resource request when calculating the Resource Qualification score.

Note: The process creates an index of resume text in a File attachment type only.

Frequency of Search Index Updates

Run the Maintain Project Resource Search Index job set often enough to account for the following changes:

- Changes in resumes, qualifications, and proficiencies for a managed project enterprise labor resource.
- A change to a resource's eligibility to fulfill project resource requests, which is indicated on the resource profile with the option to manage the resource availability and project staffing.
- New or terminated resources.

For example, assume that you require resources to update their qualifications when they complete a project, and the average project duration is two weeks. You can schedule the Maintain Project Resource Search Index job set to run once every two weeks to update the index with the latest resource qualification changes.

Oracle Text Retrieval Technology

The Maintain Project Resource Search Index job set uses the Oracle Text retrieval technology. Common resume file types are indexed, such as .doc, .txt, and .pdf.

The application counts indexed text as a keyword if the text starts with the requested keyword. For example, if a requested keyword is SQL:

- SQLPLUS is a match because it starts with SQL
- PL/SQL is a match because PL and SQL are indexed separately
- MySQL isn't a match because it doesn't start with SQL

For more information about Oracle Text, see the Oracle documentation library or My Oracle Support.

Related Topics

- Resource Qualification Score: How It's Calculated

Submitting the Process to Maintain Project Resource Search Index: Procedure

Submit the Maintain Project Resource Search Index job set to update the resources that appear on the Search and Evaluate Resources page when a resource manager searches for resources to fulfill project resource requests. The job set consists of a set of processes that facilitate efficient and rapid searches for qualified resources.

Resource managers can't search for resources or view resource details if the search index isn't available for a project resource request with qualifications or keywords. For project resource requests without qualifications and keywords, resource managers can search for and evaluate resources based on resource availability even if the search index isn't current or available.

Caution: The search index isn't available if the Maintain Project Resource Search Index job set process fails, or while the process is running.

To submit the job set:

1. Open the Setup and Maintenance work area, and go to the **Submit Process to Maintain Project Resource Search Index** task.
2. Click the **Submit Process to Maintain Project Resource Search Index** link.

3. Optionally schedule the job set to run at specific times. Setting up a schedule ensures that the index is updated on a regular basis, and has the current qualifications and proficiency information for your resources. To define a schedule:
   a. Click the Schedule tab.
   b. Select the **Using a Schedule** option.
   c. Select the date and time.
4. Optionally define a notification.
   a. Click the Notification tab.
   b. Click the **Create** icon.
   c. In the Create Notification secondary window, enter the e-mail address of the recipient.
   d. Select a condition from the list. The recipient receives a notification when the condition is true. For example, you can choose to send an e-mail to the recipient when the job set is executed successfully.
5. Optionally enter submission notes in the **Submission Notes** field.
6. Click **Submit**.
7. Click **OK** in the confirmation message window. The job set runs immediately unless you specified a schedule.
8. Navigate to the Scheduled Processes work area.
9. Review the status of each process in the job set on the Scheduled Processes page.
10. Verify that the status of the following processes is **Succeeded** on the Scheduled Processes page.
    - Maintain Project Resource Single Attribute Filters
    - Maintain Project Resource Qualification Index
    - Maintain Project Resource Qualification Filters
    - Maintain Project Resource Search Index Job Set

> **Note:** When you submit the Maintain Project Enterprise Labor Resources process, you also automatically submit the Maintain Project Resource Search Index job set.

FAQs for Define Project Enterprise Labor Resources

What's the difference between a project enterprise labor resource and a managed project enterprise labor resource?

A project enterprise labor resource is a resource that you can assign to multiple projects.

A managed project enterprise labor resource is a project enterprise labor resource whose availability and staffing are managed in Oracle Fusion Project Resource Management. You use managed project enterprise labor resources to fulfill project resource requests and directly assign to one or more projects.

Who can be a member of a resource pool?

To be a member of a resource pool, a resource must be a project enterprise labor resource whose availability and staffing are managed in Oracle Fusion Project Resource Management.

If a resource becomes ineligible for staffing, then the application:

- Sets the end date of the resource's current pool membership as of the day the resource becomes ineligible for staffing.

- Sets the start date as of the following day for the resource's membership in the Inactive Resource Pool Memberships pool.

Can I delete a resource from a resource pool?

No. Instead, you can set an end date for the resource pool membership. You can also move the resource to another resource pool.

How can I change the resource pool for resources?

Use any of the following methods to change the resource pool membership for a resource:

- Open the Manage Resource Pool Memberships window from the Manage Project Enterprise Resources page or Manage Resource Pools page. In the Manage Resource Pool Memberships window you can edit, create, and delete memberships for a resource. You can also view the resource's past, current, and future memberships.
- On the Manage Resource Pools page, select the source pool on the resource pool hierarchy. Then select, drag, and drop pool members onto the target pool in the resource pool hierarchy.
- On the Manage Resource Pools page, select pool members and click the **Move Resources** button to open a window to select the target resource pool.

Note: You can't delete a resource from a resource pool.

What happens to the search index if I revise a resource resume?

You must run the Maintain Project Resource Qualification Index process often enough to accommodate new and revised resumes. If you revise a resume attachment, and don't run the index process, then the UI will display the new resume even though the search index still contains the old resume. Run the process to add the new resume to the search index and remove the old resume.

What's the processing order of project enterprise labor resource maintenance conditions?

Records are processed by the Maintain Project Enterprise Labor Resources process in ascending order based on the process order value that you specify on the Create Condition page. For example, assume that an HCM person is included in a condition with a process order value of 1. If a resource doesn't already exist for that person, then the process creates a resource for the condition with the process order value of 1. The process doesn't create more than one resource for the same person even if subsequent conditions apply to the person.

If multiple conditions have the same process order value, then records are processed in ascending alphabetic order based on the condition name.

How can I diagnose issues with resource eligibility when creating project enterprise labor resources from employees and contingent workers?

Run the Project Enterprise Labor Resource Eligibility diagnostic test from the **Settings and Actions - Troubleshooting - Run Diagnostic Tests** menu to determine whether a person in Oracle Fusion HCM is eligible to become a project enterprise labor resource. The test generates a report showing the results of three eligibility parameters.

- Project Enterprise Labor Resource: Validates that a project enterprise labor resource doesn't exist for the person.
- Work E-Mail: Validates that the person has a valid work e-mail, and the e-mail isn't associated with an existing project enterprise labor resource or a terminated HCM person.
- Primary Assignment: Validates that the person has an active primary assignment for a person type of Employee or Contingent Worker.

Manage Target Utilization Percentages

Resource Target Utilization Percentage: How It's Determined

Target utilization is the percentage of hours that project enterprise labor resources are expected to work on project assignments compared to their available hours. The project administrator specifies the default target utilization for the enterprise, and then specifies target utilization overrides for individual jobs.

Factors That Affect Resource Target Utilization

The following factors affect the Resource Target Utilization Percentage.

- Enterprise Target Utilization Percentage: Target utilization percentage that applies to all managed project enterprise labor resources unless specific override percentages exist for a resource's job.
- Target Utilization Percentage Overrides: Target utilization percentages that override the enterprise target utilization percentage for resources with specific jobs.

  Note: The override percentage applies to resources with a job title in Oracle Fusion HCM, namely resources who are employees or contingent workers.

- The Update Resource Utilization Data process calculates target utilization for all resources who are current members of a resource pool except for the Inactive Resource Pool Memberships pool.

How the Resource Target Utilization Percentage Is Determined

The application uses the enterprise target utilization percentage for a resource if no override percentage exists for the resource's job. The default target utilization is 100%. The project application administrator can enter a new value in the **Enterprise Target Utilization Percentage** field on the Manage Target Utilization Percentages page.

The administrator can also enter a target utilization percentage override on the Manage Target Utilization Percentages page for a job. The application uses the percentage override for all resources with that job title as their active primary HCM assignment.

Target utilization percentages can be whole numbers from 0 - 100. You can enter one override percentage for each job.

Example

Assume that the target utilization for the enterprise is 80%. To set up the target utilization, change the default enterprise target utilization percentage from 100% to 80% on the Manage Target Utilization Percentages page.

Also assume that Senior Architects spend half their time on internal activities. To set up the target utilization for Senior Architects, enter 50% as the target utilization override for the job of Senior Architect.

The application uses 50% as the target utilization for all resources with the job of Senior Architect, and 80% utilization for all other resources.

Related Topics

- Resource Target Hours: How They're Calculated

- Resource Projected Utilization: How It's Calculated

Managing Target Utilization Percentages: Procedure

Target utilization is the percentage of hours that project enterprise labor resources are expected to work on project assignments compared to their available hours. Oracle Fusion Project Resource Management compares the target utilization percentages with projected and actual utilization for project resources in the Resource Manager Dashboard.

You can define a target utilization percentage for your enterprise and define target utilization percentage overrides for specific jobs. The override percentage applies to resources with a job title in Oracle Fusion HCM, namely resources who are employees or contingent workers.

To define target utilization percentage and job specific overrides:

1. Open the Setup and Maintenance work area, and go to the **Manage Target Utilization Percentages** task.
2. Click the **Manage Target Utilization Percentages** link.
3. Enter the enterprise target utilization percentage in the range of 0 through 100. The default enterprise target utilization percentage is 100.
4. Click the **Add row** icon on the Manage Target Utilization Percentages page.
5. Select a job from the **Job** choice list.
6. Enter a percentage in the range of 0 through 100 in the **Target Utilization** field. The default target utilization percentage is 100. If a resource's job doesn't have a target utilization percentage, then the application uses the enterprise target utilization percentage for that resource.This percentage:
   - Applies to all project enterprise labor resources with the specified job.
   - Overrides the enterprise target utilization percentage.
7. Click **Save and Close**.

Manage Custom Attributes for Project Resource Requests

Customizing Project Execution Management Applications: Explained

Customize view objects for Project Execution Management applications in Oracle Fusion Project Portfolio Management using Data Composer and Page Composer. You must be a project administrator to access the customizable pages.

The following sections describe the aspects of customization:

- Customizing objects
- Navigating to manage custom objects
- Using sandboxes

Customizing Objects

The following table summarizes the customizable view objects, pages, and regions in Project Execution Management applications. The view objects listed here are available on the Data Composer user interface for customizations. You can then expose the customizations to the corresponding user interface region or pages using the Page Composer.

View Object	Application Module	Corresponding Page or Region	Corresponding Business Process	Maximum Custom Attributes Allowed
RequirementVO	RequirementsAM	**Manage Backlog Items** page	Project Management, Plan Project, Track and Manage Project Requirements	170 columns, 20 date time fields, 50 number, 100 varchar
IssueVO	IssueManagementAM	**Manage Issues** page	Project Management, Control Project, Manage Project Issue	30 text fields including choice list, 5 number fields, 5 date time fields
DeliverableSimpleAssociation	DeliverablesAM	**Manage Deliverables** page	Project Management, Plan Project, Define Project Scope and Deliverables	30 text fields including choice list, 5 number fields, 5 date time fields
IssueTypeVO	IssueManagementAM	Manage Issue Types task	Project Management, Setup Project Management, Define Project Management Configuration, Manage Issue Types	30 text fields including choice list, 5 number fields, 5 date time fields
DeliverableTypeVO	DeliverablesAM	Manage Deliverable Types task	Project Management, Setup Project Management, Define Project Management Configuration, Manage Deliverable Types	30 text fields including choice list, 5 number fields, 5 date time fields
ResourceRequestVO	ResourceRequestAM ProjectManagerRequestAM	**Manage Project Resource Requests** page	Project Management, Manage Project Resources, Manage Resource Demand, Create Project Resource Request	100 text fields, 50 number fields, 20 date fields

Navigating to Manage Custom Objects

To customize objects, access the **Manage Project Execution Management Custom Objects** using the **Projects Custom Objects** link from the Navigator. To set up sandbox, select the **Manage Sandboxes** menu item from the **Administration** menu in the global area of Oracle Fusion Applications.

Using Sandboxes

You must create or select an appropriate sandbox, and set it as active to capture your customizations using Page Composer. Publish the sandbox to make your changes available to users.

Related Topics

- Customizing Page Headers and Task Labels for Change Orders: Explained

Integrating Absence Management and Project Execution Management Applications: Critical Choices

Time and labor administrators can set up integration between Oracle Fusion Absence Management and Project Execution Management applications for transferring absence records. Team members, project managers, and resource managers can use the integration to:

- Enter, review, and cancel absences in Oracle Fusion Absence Management.
- View the available capacity score of project resources on the Resource Schedule page.
- View the recorded absences on the resource schedule, project calendar, and Team Member Dashboard.

You can set up the integration by using one of the following setup criteria:

- Predefined setup criteria
- Custom setup criteria

Predefined Setup Criteria

Setup tasks for the integration are available in the Workforce Deployment offering. Use the predefined time consumer set **Project Execution Management Only** and worker time processing profile **Project Execution Management Time Processing Profile** to set up this feature.

Custom Setup Criteria

Perform the following setup tasks to define your own setup criteria for specific business needs:

1. Manage Time Layout Sets
2. Manage HCM Groups
3. Manage Worker Time Entry Profiles
4. Manage Time Consumer Sets
5. Manage Worker Time Processing Profiles

Manage Time Layout Sets

Define a group of layouts that determine the availability and order of fields on the Time work area. You can:

- Use a predefined layout set or create a new layout set.
- Include the time type field or absence management fields in the layout to store time entries that you want to transfer to the Project Execution Management applications.

Manage HCM Groups

Create groups of people with similar characteristics. You can:

- Use a predefined HCM group, such as Projects Usage or Projects and Payroll Usage.
- Create a new group. Include users in new groups by selecting the **Refresh Group Membership** action from the home page.

- Assign the groups to time entry profiles to associate time layout sets with appropriate workers.

Manage Worker Time Entry Profiles

Associate people from an HCM group with a time entry profile. You can:

- Use the predefined **Projects and Payroll Time Entry Profile** to help your workers enter time for Oracle Fusion Project Costing, Project Execution Management applications, and Oracle Fusion Global Payroll.
- Create your own profiles to use different groups or layout sets. These profiles enable you to configure the actions, such as create, view, edit, and delete that workers can perform on time cards.

Manage Time Consumer Sets

Specify the consumers of reported time, such as Oracle Fusion Project Costing, Project Execution Management Applications, or Oracle Fusion Global Payroll. You can:

- Use a predefined time consumer set.
- Create a new set to specify the appropriate consumers.

Note: For Project Execution Management applications the time category is set to **All Absence Entries**.

Manage Worker Time Processing Profiles

Associate layout sets with workers. The task also identifies the time entry and calculation rules to run for time that the workers report. You can:

- Use a predefined worker time processing profile or create new profiles.
- For a new profile, select a time consumer set and then select the appropriate HCM group.
- Set the lowest profile number for your new profile to override other time processing profiles.

Related Topics

- Configuring the Various Time Entry Layouts: Worked Example
- Creating Time Consumer Sets: Points to Consider
- Defining Groups: Worked Example

8 Define Extensions for Project Execution Management

Define Extensions for Project Execution Management: Overview

In the Define Extensions for Project Execution Management activity, you perform common setup steps such as maintaining common reference objects and configuring help for Project Execution Management applications. This activity contains advanced setup tasks that aren't required for a typical implementation of Project Execution Management applications.

Setup tasks in the Define Extensions for Project Execution Management activity are grouped into the following task lists:

Task List	Description
Define Approval Management for Project Execution Management	Define approval routing structures and controls to match your organization's needs.
Define Help Configuration	Define what users can see and do in a local deployment of Oracle Fusion Applications Help.
Maintain Common Reference Objects	Review and manage common objects, for example profiles and lookups, which affect the functionality and look of applications.
Define Custom Enterprise Scheduler Jobs for Project Execution Management	Set up custom jobs using the Enterprise Scheduler Service configuration for Oracle Fusion Project Execution Management.

9 Define Extensions: Transactional Business Intelligence Configuration

Define Transactional Business Intelligence Configuration: Overview

Use the Define Transactional Business Intelligence task list in the Setup and Maintenance work area to complete configuration of business intelligence in your application. Some tasks in this task list are performed during Oracle Applications Cloud provisioning and require no further action from you. The Define Transactional Business Intelligence Configuration task list includes the following tasks:

- Optimize Transactional Business Intelligence Repository

  Trim unused projects from the business intelligence repository based on configured Oracle Applications Cloud offerings. This optimization is automated during the provisioning process and requires no further action from you.
- Manage Transactional Business Intelligence Connections

  Review data source connections in the physical layer of the business intelligence repository. Connections are set up and reviewed during the provisioning process, and this task requires no further action from you.
- Manage Security for Transactional Business Intelligence

  Review security for business intelligence users. The default security configuration can be modified. Refer to the security documentation for your cloud services to review or change the default user security model.
- Configure Key Flexfields for Transactional Business Intelligence

  Define the key flexfield segments and validation for use as classification keys. You must define these key flexfields for Oracle Fusion Transactional Business Intelligence to operate correctly.
- Configure Descriptive Flexfields for Transactional Business Intelligence

  Define validation and display properties of descriptive flexfields, which are used to add custom attributes to entities. You enable and import flexfields for use in analyses.
- Import Essbase Cubes into Transactional Business Intelligence Repository for Financials General Ledger

  Import Essbase cubes into the business intelligence repository. You must perform this task if you're using Oracle Fusion General Ledger.
- Manage User Currency Preferences in Transactional Business Intelligence

  Manage user currency preferences, which control regional currency settings, currency used in reports, and corporate currency.

Related Topics

- Essbase Rule File and Cubes: Overview
- Configuring Flexfields for Use in Analyses: Overview

- Configuring Descriptive Flexfields for Transactional Business Intelligence: Overview
- Importing Flexfield Changes: Overview
- Setting Currency Preferences for Analytics

10 Define Extensions: Approval Management

Approval Management: Highlights

Use approval management to define policies that apply to approval workflows. For example, to reflect your own corporate policies, you can specify levels of approval for expense reports over a particular amount and determine how the approvals are routed.

Approval management:

- Controls workflows for business objects such as expense reports.
- Enables you to define complex, multistage task routing rules.
- Integrates with the setup in Human Capital Management (HCM) to derive approvers based on the supervisory hierarchy.

To define approval management, use the Define Approval Management task list in the Setup and Maintenance work area. The task list includes setup tasks for managing workflow task configurations and approval groups.

Task Configuration

Manage rule sets and rules that control approval flows.

- To configure a predefined approval policy, select the predefined rule set and click the Edit Task icon.
- To disable a predefined rule set, select the Ignore participant check box for that rule set.
- To edit the rules within a predefined rule set, you can insert, update, or delete while in edit mode.
- You can configure a specific rule to automatically approve a task without sending it to any approver.
    - Modify the routing for that rule so that it is sent to the initiator (which means the requestor is the approver).
    - Set the Auto Action Enabled option to True.
    - Enter APPROVE in the Auto Action field.

Approval Groups

Each approval group includes a set of users that you configure to act on tasks in a certain pattern. Tasks can be defined to get routed to an approval group instead of an individual user.

- You can nest approval groups within approval groups.
- You have two options for defining the group:
    - Static: Select the specific users to include in the group.
    - Dynamic: Provide the logic to use to determine the users in the group.

Customization

You can also customize predefined approval workflows, for example to add post-approval activities or additional stages (not available for Oracle Cloud implementations).

- Refer to the Oracle Fusion Applications Extensibility Guide for Developers.
  See: Customizing and Extending SOA Components

Other Workflow Setup

Determining When Workflow Tasks Are Automatically Dismissed or Withdrawn: Points to Consider

Only workflow tasks with a final status, such as Completed or Withdrawn, can be purged and removed from users' worklists. Tasks go from the Assigned status to the Completed status when the final assignee approves or rejects the tasks, or, with **for your information** (FYI) tasks, when assignees explicitly dismiss the tasks. If assignees don't take actions that result in a final task status, within a certain period of time, then the tasks are automatically dismissed (FYI tasks) or withdrawn (all other tasks).

When Tasks are Eligible for Automatic Dismissal or Withdrawal

The FYI Notifications Expiration Period profile option determines when FYI tasks are eligible for automatic dismissal. In the Setup and Maintenance work area, use the Manage Applications Core Administrator Profile Values or Manage Administrator Profile Values task to set the profile option.

- Leave the profile option with the default value of 7, or replace it with a different number.
- The profile value represents the number of days after the FYI task is created.

When assignees don't read or dismiss an FYI task within the specified number of days after the task was created, the task is then eligible to be automatically dismissed.

All other tasks are eligible for automatic withdrawal when assignees don't take action to send the task to a final status within six months after the task was created.

When Eligible Tasks Are Automatically Dismissed or Withdrawn

Different processes run to automatically dismiss eligible FYI tasks or withdraw all other eligible tasks.

- **FYI Tasks:** The process runs every three days, starting the first day of each month. For example, it runs on May 1, 4, 7, and so on, and again on June 1 and every three days after. So, if you leave the FYI Notifications Expiration Period profile value at 7, then depending on when the process runs, an FYI task can be automatically dismissed within seven to ten days after it's created. The process changes the FYI task status from Assigned to Completed.
- **All Other Tasks:** The process runs every three days, starting the second day of each month. For example, it runs on May 2, 5, 8, and so on, and again on June 2 and every three days after. The process changes the status of eligible tasks to Withdrawn.

Related Topics

- Setting Profile Option Values: Procedure

Setting Up the Worklist Region on My Dashboard: Points to Consider

Worklist: Notifications and Approvals is one of the predefined regions users can add to My Dashboard (**Navigator - My Dashboard**), which is blank by default. This region contains workflow tasks. To set up this Worklist region, select a value for the Welcome Dashboard Worklist Timeout Interval (ATK_HOME_PAGE_WORKLIST_TIMEOUT) profile option. In the Setup and Maintenance work area, use the Manage Application Toolkit Administrator Profile Values or Manage Administrator Profile Values task to set this profile option.

Profile Value Considerations

When users open My Dashboard and it contains the Worklist: Notifications and Approvals region, data for the region is retrieved. The profile option determines how long to continue retrieving before timing out and displaying no data.

- If you don't set a value for this profile option, which is blank by default, then the region doesn't time out.
- Retrieving data for the Worklist region affects the performance of My Dashboard as a whole. So, select a value for this profile option if your users have the Worklist region on My Dashboard and notice performance issues.

After the timeout, users can refresh the region to try retrieving the data again.

Related Topics

- Setting Profile Option Values: Procedure

11 Define Extensions: Help Configuration

Setting Up Help: Overview

Applications Help works without you having to set anything up. You can do the optional setup, mainly if you want to customize help. Select the help features you want, perform tasks in the Define Help Configuration task list, and customize help.

Help Feature Choices

In the Setup and Maintenance work area, select help feature choices on the Features page when you configure your offerings. Feature choices determine:

- What's available in Applications Help
- What you can configure to set up help

The first feature choice for help is Local Installation of Help, and you must leave it selected. Other feature choices are:

- Access to Internet-Based Help Features
- Help Customization
- Custom Help Security

Define Help Configuration Task List

In the Setup and Maintenance work area, use these tasks in the Define Help Configuration task list to configure Applications Help for all users:

- **Set Help Options:**
  - Determine if certain features of Applications Help are available to users.
  - Control how aspects of Applications Help work.
- **Assign Help Text Administration Duty:** Contact your security administrator to determine who can customize help.
- **Manage Help Security Groups:** Set up security to limit access to certain help files.

Help Customization

After you configure help, you can review the predefined help and see if you want to add or customize any content. You can also customize help text that appears on the page, for example hints.

Related Topics

- Features: Explained

- Help File Customization: Overview
- Customizing Help That Appears on the Page: Highlights

Set Help Options

Setting Up Access to Web Sites from Applications Help: Procedure

You can determine the Web sites that users can access from Applications Help.

Setting Up Access to External Web Sites

Follow these steps:

1. In the Setup and Maintenance work area, open the Features page for your offering.
2. Leave the **Location Installation of Help** feature choice selected.
3. Select the **Access to Internet-Based Help Features** feature choice to allow access to Web sites from Applications Help. For example, some help files link to guides on the Oracle Help Center; this access is necessary for those links to work.
4. Select other feature choices as needed, and click **Done**.
5. Open the Set Help Options task.
6. In the Web Sites Available from Help Site section, select the sites to link to from the Navigator menu in Applications Help.
7. Save your work.

Setting Up Help Customization: Procedure

Users with the appropriate roles can customize predefined help or add their own files to help. To enable and set up help customization, do the following steps in the Setup and Maintenance work area, in the specified order.

Selecting Feature Choices

Perform these steps:

1. On the Features page for your offering, leave the Local Installation of Help feature choice selected.
2. Select the Help Customization feature choice.
3. Select the Custom Help Security feature choice if you want certain help files to be available only to a restricted set of users.

   Caution: Don't select this feature choice if you don't have this requirement, because the feature can affect performance.

4. Save your work.

Setting Help Options

Perform these steps:

1. Open the Set Help Options task in the Setup and Maintenance work area.

2. Optionally set options in these sections:

    - **Help Site Customization:**

        - Determine how users can identify custom files in Applications Help.
        - Upload your own image to use as the background picture on the help home page. Select an image that's white along the entire left border, like you see in the default image.
    - **Oracle User Productivity Kit:** Add a link in the Navigator in Applications Help to your custom User Productivity Kit library.
    - **Privacy Statement:** Add a link to your own privacy statement. To see this link, users click their user name in the global area of Applications Help.
3. Save your work.

Providing Users Access to Help Customization

Only users with job roles containing the ATK_CUSTOMIZE_HELP_TOPICS_PRIV privilege can customize help. The Assign Help Text Administration Duty task is a reminder for you to follow up with your security administrator. Make sure that users who want to customize help have the access to do so.

Setting Up Help File Security

If you selected the Custom Help Security feature choice, then go to the Manage Help Security Groups task and select job roles to include in help security groups.

When you later customize a help file, you can select a group to determine which job roles have access to the file.

FAQs for Set Help Options

Why can't I see certain sections on the Set Help Options page?

What's available on the page depends on the help feature choices that you select in the Setup and Maintenance work area. This table describes the correlation between feature choices and specific sections on the Set Help Options page.

Help Feature Choice	Section on Set Help Options Page
Local Installation of Help	None, but without selecting this feature choice, you can't select the other help feature choices
Access to Internet-Based Help Features	Web Sites Available from Help Site
Help Customization	Help Site Customization Oracle User Productivity Kit Privacy Statement
Custom Help Security	None

When do I link to the Oracle User Productivity Kit library from Applications Help?

If you license Oracle User Productivity Kit and have custom User Productivity Kit content to share with your users. Topics that you add as custom help files in Applications Help are available only in the See It mode. However, in the library, users can see the same topic in other modes. If you have User Productivity Kit versions earlier than 3.6.1, then you can't add User Productivity Kit topics as custom help. So the link to the library is the only way users can get custom User Productivity Kit content from Applications Help.

What's the URL for my Oracle User Productivity Kit library?

The full path from the Web server where you're hosting your Oracle User Productivity Kit content to the **`index.html`** file that opens the table of contents for the library. For example, **`http://<your domain>.com/MyContent/PlayerPackage/index.html`**.

In this example, you or your administrator published one player package that contains all the content to be linked to from Applications Help, including the **`index.html`** file, and placed the PlayerPackage folder in a folder called MyContent on the Web server.

FAQs for Assign Help Text Administration Duty

Who can add and manage custom help?

Users with the Customize Help Topics (ATK_CUSTOMIZE_HELP_TOPICS_PRIV) privilege can customize:

- Help in Applications Help and help windows
- Pages in the Getting Started work area

This privilege is assigned by default to the administrators for product families. Your security administrator can define which users have job roles with this privilege.

Manage Help Security Groups

Creating Help Security Groups: Worked Example

This example shows how to create a help security group, which contains a set of job roles. You can later assign the help security group to particular help files so that only users with any of the included job roles have access to the help.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
What type of users do you need to limit help access to?	Human resources (HR) specialists
Is there a specific time period for which this access is needed?	No, the help files should always be viewed only by the HR specialists
Where do you want this group to appear in the list of values for help security groups?	First

Define a help security group and assign a job role to the group.

Prerequisites

1. Open the Features page for your offerings in the Setup and Maintenance work area.
2. Make sure that the Location Installation of Help feature choice is selected.

Creating the Help Security Group

1. In the Setup and Maintenance work area, go to the Manage Help Security Groups task.
2. On the Manage Help Security Groups page, add a new row.
3. Complete the fields, as shown in this table. Leave the start and end dates blank.

Field	Value
Help Security Group	HR
Meaning	HR Only
Description	Viewing by HR specialists only
Display Sequence	1

4. Click **Save**.
5. With your new help security group selected, go to the Associated Roles section and add a new row.
6. Select **PER_HUMAN_RESOURCE_SPECIALIST** as the role name.
7. Click **Save and Close**.
   To assign your new help security group to help files, you must create or edit help using the Manage Custom Help page, not help windows.

Related Topics

- How can I restrict access to specific help files?

12 Define Extensions: Common Reference Objects

Maintain Common Reference Objects: Overview

The Maintain Common Reference Objects task list contains tasks that support implementation of common functionality, such as data security, reference data sets, or general preferences.

Use this task list to manage common reference objects that are defined centrally and shared across applications. You can search for and access this task list in the Setup and Maintenance work area.

To make the Maintain Common Reference Objects task list available in your implementation project, go to **Setup and Maintenance - Configure Offerings**, and for a specific offering, select the Maintain Common Reference Objects feature choice.

Related Topics

- Moving Common Reference Objects: Overview

Why can't I edit setup data?

The configuration of your setup data may be protected. Application developers mark some configurations as protected, indicating that you can't edit them.

Some examples of configurations that may be protected are:

- Descriptive flexfields
- Extensible flexfield contexts
- Extensible flexfield pages
- Value sets
- Tree structures

Define Application Taxonomy

Application Taxonomy: Highlights

Oracle application components and functions are organized in a hierarchy, ranging from product lines to logical business areas. The hierarchy represents a breakdown of products into units based on how applications are installed and supported.

In the Setup and Maintenance work area, search for the Manage Taxonomy Hierarchy task and view the hierarchy on the Manage Taxonomy Hierarchy page.

A detailed introduction to application taxonomy is provided in the Oracle Fusion Applications Developer's Guide.

Hierarchy

- The application taxonomy hierarchy contains various levels and types of nodes, or modules.

  See: Characteristics of the Level Categories

  See: Benefits of a Logical Hierarchy

Usage

- Use application taxonomy to understand relationships among applications and between an application and its files. This information is helpful in managing various phases of the product life cycle.

  See: How to Manage the Life cycle

Modules in Application Taxonomy: Explained

The top level of the hierarchy is product line, followed by the product family, application, and logical business area. There can be multiple levels of logical business areas, with one or more nested within a parent logical business area. A module is a node at any of these levels. Each level is briefly described here.

- Product Line: A collection of product under a single brand name, for example, Oracle Fusion.
- Product Family: A collection of products associated with a functional area that may or may not be licensed together as a single unit, for example Financials.
- Application: A single product within a product family, containing closely related features for a specific business solution, for example General Ledger.
- Logical Business Area: A collection of business object definitions organized into a logical grouping. It contains the model objects, services, and UI components for those business objects. Logical business areas have their own hierarchy levels and in some cases can be up to two or three levels deep.

Managing Modules in Application Taxonomy: Points to Consider

In the application taxonomy hierarchy, when you create a module, it becomes a child of the currently selected node. Once created, you cannot delete the module or move it elsewhere in the hierarchy.

From the Manage Taxonomy Hierarchy page, navigate to the Create Child Module or Edit Module page to manage the modules. As you create or edit modules, consider the following points regarding specific fields.

Identifiers

Module ID is the unique primary key for nodes in the taxonomy table. When you create a module, a unique read-only ID is automatically generated. The module contains two other identifiers: Module key and alternative ID. The module key is a string identifier, for example AP for the Oracle Fusion Payables application. The alternative ID is a numeric identifier, for example 1 for the Oracle Fusion product line. These additional identifiers are provided for the product line, product family, and application modules. However, you can optionally add them for logical business areas and new custom modules.

Note: Don't change the module key or alternative ID for predefined modules.

The product code is relevant only to application and logical business area modules. You can leave the field blank for other module types. The product code for applications is the short name that can be displayed in lists of application values. For example, FND for Oracle Fusion Middleware Extensions for Oracle Application.

Names

Module name is the logical name for the module. The name must be unique among nodes within the hierarchy level with the same parent, but Oracle recommends keeping it unique in the entire hierarchy. The user name and description can appear to users in other parts of Oracle Applications Cloud.

Usage Types

Though you can update the usage type to reflect the current state of the module, just doing so does not affect the actual state. For example, setting a module as installed doesn't mean the module is actually installed if the installation itself didn't take place. Installation refers to operations related to laying down all the components required to create an Oracle Applications Cloud environment. Deployment is the process that starts the managed servers and clusters and facilitates the actual use of product offerings. A licensed module is available for installation and deployment, and a deployed module is considered actively used when actually used by users.

Seed Data

If seed data is allowed, then data residing in flexfields and lookups can be extracted for the module using seed data loaders. By default, extract is allowed for all predefined modules of type application and logical business area.

Associations

You can associate a logical domain to modules of the type Product Family, as well as one or more enterprise applications to modules of type Application. This association represents the relationship between the taxonomy modules and the corresponding domain and enterprise applications stored in the Oracle Applications Cloud Functional Core (ASK) tables.

Define ISO Reference Data

Defining Currencies: Points to Consider

When creating or editing currencies, consider these points relevant to entering the currency code, date range, or symbol for the currency.

Currency Codes

You can't change a currency code after you enable the currency, even if you later disable that currency.

Date Ranges

You can enter transactions denominated in the currency only for the dates within the specified range. If you don't enter a start date, then the currency is valid immediately. If you don't enter an end date, then the currency is valid indefinitely.

Symbols

Some applications support displaying currency symbols. You may enter the symbol associated with a currency so that it appears along with the amount.

Euro Currency Derivation: Explained

Use the Derivation Type, Derivation Factor, and Derivation Effective Date fields to define the relationship between the official currency (Euro) of the European Monetary Union (EMU) and the national currencies of EMU member states. For each EMU currency, you define its Euro-to-EMU fixed conversion rate and the effective starting date. If you have to use a different currency for Euro, you can disable the predefined currency and create a new one.

Derivation Type

The **Euro currency** derivation type is used only for the Euro, and the **Euro derived** derivation type identifies national currencies of EMU member states. All other currencies don't have derivation types.

Derivation Factor

The derivation factor is the fixed conversion rate by which you multiply one Euro to derive the equivalent EMU currency amount. The Euro currency itself must not have a derivation factor.

Derivation Effective Date

The derivation effective date is the date on which the relationship between the EMU currency and the Euro begins.

Natural Languages: Points to Consider

Natural languages are all the languages that humans use, written and spoken. If a language is enabled, then users can associate it with entities, for example as languages spoken by sales representatives. When managing natural languages, consider tasks to perform and best practices for entering particular values.

Tasks

Once you add a language, it can't be deleted, but just disabled. You can optionally associate natural languages with International Organization for Standardization (ISO) languages and territories, just for reference.

Values

When you create a natural language, use the alpha-2 ISO code as the language code, or, if not available, then alpha-3. If the language is not an ISO language, then use **x-** as a prefix for the code, for example **x-ja** for a Japanese dialect. Use the **sgn** code of ISO-639-2 for sign languages, followed by territory code, for example **sgn-US** for American Sign Language. You can also use Internet Assigned Numbers Authority (IANA) language tags.

The natural language description must be the language name with territory name in parenthesis where needed, for example **English (Australia)** and **English (Canada)**.

FAQs for Define ISO Reference Data

When do I create or edit territories?

The predefined territories are countries from the International Organization for Standardization (ISO) 3166 standard. Edit territory descriptions to determine how they are displayed in lists of country values in an application. You don't have to edit territory names or codes unless there is a specific requirement. Create territories if new countries emerge and the application isn't yet patched with the latest ISO country values.

Note: The National Language Support (NLS) territory codes are territory identifiers used in the application. Don't edit the codes unless you must change the association between ISO and the application territory.

When do I create or edit industries?

To meet a specific business need, you may edit industry names or descriptions of industries except for those belonging to the North American Industry Classification System (NAICS). Edit the industry descriptions also to determine how they appear in an application.

You may also create industries that contain customizations not included in the NAICS standards.

When do I associate industries with territories?

To meet specific business needs, you can associate industries with territories. For example, administrators can customize a page in different ways for different sets of users of the same industry, but residing in different countries.

When do I create or enable currencies?

Create or enable any currency for displaying monetary amounts, assigning currency to ledgers, entering transactions, recording balances, or for any reporting purpose. All currencies listed in the International Organization for Standardization (ISO) 4217 standard are supported.

The default currency is set to United States Dollar (USD).

What's the difference between precision, extended precision, and minimum accountable unit for a currency?

Precision refers to the number of digits placed to the right of the decimal point used in regular currency transactions. For example, USD would have 2 as the precision value for transactional amounts, such as $1.00.

Extended precision is the number of digits placed to the right of the decimal point and must be greater than or equal to the precision value. For calculations requiring greater precision, you can enter an extended precision value such as 3 or 4. That would result in the currency appearing as $1.279 or $1.2793.

Minimum accountable unit is the smallest denomination for the currency. For example, for USD that would be .01 for a cent.

In Setup and Maintenance work area, search for the Manage Currencies task to set these values for a currency.

What's a statistical unit currency type?

The statistical unit currency type denotes the Statistical (STAT) currency used to record financial statistics in the financial reports, allocation formulas, and other calculations.

When do I create or edit ISO languages?

Edit the names and descriptions of International Organization for Standardization (ISO) languages to determine how they appear in the application. The ISO languages are a part of the ISO 639 standard. If any change to the ISO standard doesn't reflect in the application, you can update the ISO alpha-2 code or add languages to provide up-to-date information.

When do I edit languages?

Installed languages automatically appear on the Manage Languages page. This page also displays all languages that are available for installation and translation. Each dialect is treated as a separate language.

Generally, you don't need to edit any of the detailed fields unless absolutely necessary.

When do I create or edit time zones?

Though all standard time zones are provided, enable only a subset for use in lists of time zone values. You can add time zones if new zones became standard and the application isn't yet patched with the latest values.

Manage Audit Policies

Managing Audit Policies: Explained

Auditing is used to monitor user activity and all configuration, security, and data changes that have been made to an application. Auditing involves recording and retrieving information pertaining to the creation, modification, and removal of business objects. All actions performed on the business objects and the modified values are also recorded. The audit information is stored without any intervention of the user or any explicit user action.

Use audit policies to select specific business objects and attributes to be audited. The decision to create policies usually depends on the type of information to be audited and to the level of detail required for reporting.

Enabling Audit Functionality

For Oracle Applications Cloud, you must configure the business objects and select the attributes before enabling audit. If you enable audit without configuring the business objects, auditing remains inactive. By default, auditing is disabled for all applications. To enable and manage audit, ensure that you have a role with the assigned privilege Manage Audit Policies (FND_MANAGE_AUDIT_POLICIES_PRIV). For appropriate assignment of roles and privileges, check with your security administrator.

To enable auditing for Oracle Fusion Middleware products, select one of the levels at which auditing is required for that product. The audit levels are predefined and contain the metadata and events to be audited. For more information, see Audit Events for Oracle Applications Cloud Middleware (Doc ID 2114143.1) on My Oracle Support at https://support.oracle.com.

If you don't want an application to be audited, you can stop the audit process by setting the Audit Level option to **None**.

Related Topics

- Audit Events for Oracle Applications Cloud Middleware

Configuring Audit Business Object Attributes: Points to Consider

Audit enables tracking the change history of particular attributes of a business object. However, those objects and their attributes must be selected for audit and auditing must be enabled for that application. Your configuration settings determine which attributes to audit for a given object, and when the audit starts and ends. Auditing takes into account all the operations performed on an object and its attributes, such as create, update, and delete. To configure audit business object attributes, navigate to the Manage Audit Policies page in the Setup and Maintenance work area.

Selecting an Application

To set up auditing, you must select a web application that contains the required business objects that can be audited. From the list of business objects, select those business objects that you want to audit. Selecting a business object also displays its attributes that are enabled for auditing.

Selecting Attributes

For each selected business object to be audited, select the corresponding attributes to include in the audit. All attributes that belong to that object are by default selected for audit and appear on the user interface. However, you can add or remove attributes from the list. When you remove an attribute from the list, you stop auditing it even when the parent object is selected for audit. So, if you want an attribute to be audited, you must add it to the list. If the object selected in an audit hierarchy is also a part of several other audit hierarchies, the attribute configuration for that object is applicable to all the hierarchies in that application.

Tip: For business objects based on flexfields, select the Flexfields (Additional Attributes) check box to view and add or remove flexfield attributes, to include or exclude them from the audit.

Starting and Stopping Audit

The business object is ready for audit after you select its attributes and save the configuration changes. However, to start auditing, the audit level for Oracle Applications Cloud must be set to **Auditing** on the Manage Audit Policies page.

To stop auditing an object, you can deselect the entire object and save the configuration. As a result, all its selected attributes are automatically deselected and are not audited. To continue to audit the business object with select attributes, deselect those attributes that are not to be audited. When users view the audit history for an application, they can specify the period for which they want the results. Therefore, make a note of when you start and stop auditing an application.

For example, users intend to view the audit history of an object for the previous week, but auditing for that object was stopped last month. They wouldn't get any audit results for that week, because during the entire month that object wasn't audited. Even if you enable audit for that object today, users can't get the wanted results because audit data until today isn't available.

Configuring Audit: Highlights

To set up auditing for Oracle Applications Cloud, use the Manage Audit Policies page in the Setup and Maintenance work area. To set up auditing for Oracle Fusion Middleware products, select the level of auditing mapped to a predefined set of metadata and the events that have to be audited. Information about configuring audit for Oracle Fusion Middleware products is provided in Oracle Fusion Middleware guides.

You can also create a configuration file and deploy it to audit a specific Oracle Fusion Middleware product. The configuration details for Oracle Fusion Middleware products are available as audit-specific assets that you can use to create the config.xml configuration file. To get a list of audit-specific assets, see Audit Events for Oracle Applications Cloud Middleware (Doc ID 2114143.1) on My Oracle Support at https://support.oracle.com.

Oracle Fusion Middleware Products

- Configure business objects to enable auditing in Oracle Fusion Middleware products. Refer to the Oracle Fusion Middleware Security and Administrator's Guide for Web Services.

  See: Auditing Web Services

Oracle Fusion Security Products

- Configure business objects to enable auditing in Oracle Fusion security products. Refer to Oracle Fusion Middleware Application Security Guide.

  See: Oracle Fusion Middleware Audit Framework Reference

Related Topics

- Audit Events for Oracle Applications Cloud Middleware

Manage Oracle Social Network Objects

Managing Oracle Social Network Objects: Explained

Use the Manage Oracle Social Network Objects task for managing the Oracle Social Network Objects. The integration of Oracle Social Network with applications and business processes brings key attributes from the applications to share, socialize, and update information. This helps in making better business decisions based on additional information that you obtain and analyze within your social network environment.

Use the Manage Oracle Social Network Objects page to set up and define:

- The business objects and attributes to enable
- The enablement method for social network integration with Oracle Applications Cloud

To open the Manage Oracle Social Network Objects page, start in the **Setup and Maintenance Overview** page and search for the Manage Oracle Social Network Objects task.

Use Oracle Social Network to:

- Discuss projects and plans in public forums
- Maintain:
  - Membership groups
  - Activity feeds of the people you select
- Facilitate:
  - One-on-one Conversations
  - Reviews
  - Document sharing

Note: Oracle Social Network is currently available in Cloud implementations only.

An important aspect of managing Oracle Social Network objects is enabling business objects for integration.

Enabling Business Objects for Integration

A business object can't be shared within social network until a functional administrator or implementor:

- Accesses the Manage Oracle Social Network Objects page in Oracle Applications Cloud
- Enables the business object for social network integration

Enabling Social Networking on Objects: Critical Choices

You can determine whether information about a business object, such as benefit plans or sales accounts, displays in Oracle Social Network. If you enable an object for sharing, you allow users to collaborate on the object through social networking. You can choose whether all instances of an object are shared, or only at the user's discretion. You can also choose which attributes are shared, such as names, details, and who made the last update.

In addition to a wide range of predefined objects, you can share:

- Custom objects and attributes created in Application Composer
- Custom fields created in descriptive flexfields

Use the Manage Oracle Social Network Objects task in the Setup and Maintenance work area.

After you click **Enable Object**, select one of the following enablement options:

- Manual
- Automatic
- No

Manual

If you select this option, which is recommended, you let users decide whether to share each instance of the object with the social network. Once shared, all updates to the enabled attributes of the instance appear on the social network. If the instance is deleted, that information is also shared.

Click **Enable All** to enable all objects for all applications. Enable All automatically applies the Manual option, which means that the user can choose whether to share an object instance.

Automatic

With this option, news about all instances of the object appears on the social network, including:

- Every newly created instance
- All subsequent updates to the enabled attributes
- Deletion of any instances

No

With this option, which is the default value, no news about the object appears on the social network.

> **Note:** When you click **Disable Object**, the enabled setting of the selected business object is automatically changed to No.

After you enable a business object, you must enable one or more attributes of the object. Only the enabled attributes are shared. The Status column in the Business Objects table indicates which enabled business objects don't yet have an enabled attribute. For these objects, only the following information appear on the social network:

- Internal bookkeeping information, when creating or updating an instance of the object.
- News that an instance is deleted.

Update Translations: Explained

The Update Translations process sends attribute labels and business object names to Oracle Social Network for use in the user interface.

In social network, the attribute or business object labels appear in the language of your locale. If you change the locale in social network, then the attribute or business object labels appear in the updated language. However, the data appears in the language in which it was originally sent to social network. If you have previously sent an instance of the business object to social network, then the instance data isn't updated. Clicking **Update Translations** on the Manage Oracle Social Network Objects page sends translations for business objects with the enablement option as **Manual** or **Automatic**.

Synchronize Business Objects: Explained

Use **Synchronize** on the Manage Oracle Social Network Objects page to synchronize business objects. This resends the definitions of business objects having the enablement option as **Manual** or **Automatic** to Oracle Social Network.

Use the Synchronize button at the:

- **Business Objects table level**: To resend the definitions of a selected business object to social network. This button is enabled only when you select a row for a business object with the enablement option as **Manual** or **Automatic**.
- **Manage Oracle Social Network Objects page level**: To resend the definitions of all business objects with the enablement option as **Manual** or **Automatic** to social network.

Note: If you had modified any business object enabled for social network and not saved your changes, then on clicking **Synchronize**, a warning message appears. This message informs you that you have not saved your changes, and you can select one of the following options:

- **Save and Synchronize**: To save the modified business objects, and synchronize the unmodified business objects.
- **Synchronize**: To ignore any unsaved business objects, and only synchronize the unmodified business objects.
- **Cancel**: To cancel the synchronization task.

FAQs for Manage Oracle Social Network Objects

What happens if I update translations?

When you update translations, you send translations for business objects with the enablement option as **Manual** or **Automatic** to Oracle Social Network.

On updating translations, you also:

- Synchronize the newly translated text from Oracle Applications Cloud so that it can be used within social network. This means you can:
  - Install and enable a new language.
  - Take a language patch at any time.

- Send attribute labels and business object names to social network for use in its user interface.

How can I update translations?

Use **Update Translations** on the Manage Oracle Social Network Objects page for subsequent updates to labels and attributes.

Use the **Update Translations** button at the:

- **Business Objects table level**: To send translations for a selected business object to Oracle Social Network. This button is enabled only when you select a row for a business object with the enablement option as Manual or Automatic.
- **Manage Oracle Social Network Objects page level**: To send translations for all business objects with the enablement option as **Manual** or **Automatic** to social network.

Note: When you save the enablement of a business object to social network, it sends the translations as well. Hence, you need not click **Update Translations** after saving the enablement.

When do I update translations?

Run the **Update Translations** process only after you install a new language pack of Oracle Applications Cloud.

Updating translations synchronizes the newly translated text to Oracle Social Network for integration with Oracle Applications Cloud.

Note: When you save the enablement of a business object to social network, it sends the translations as well. Hence, you need not click **Update Translations** after saving the enablement.

What happens if I synchronize business objects?

When you synchronize business objects, you resend the definitions of business objects having the enablement option as **Manual** or **Automatic** to Oracle Social Network.

When do I synchronize business objects?

Run the Synchronize process after you use customization sets to import the setup from the Manage Oracle Social Network Objects page in another environment.

You can also run the process whenever you want to synchronize the settings of business objects with social network without making changes in the Manage Oracle Social Network Objects page.

Related Topics

- Using Customization Migration to Move Customizations: Points to Consider

Manage Applications Core Common Reference Objects

Define Applications Core Configuration: Overview

The Define Applications Core Configurations task list contains the Oracle Middleware Extensions for Oracle Application (Applications Core) tasks that support implementation of common functionality such as lookups, profile options, document sequences, and so on.

Use this task list to manage configuration objects that are defined centrally and shared across applications, in addition to tasks classified under the Maintain Common Reference Objects task list. You can search for this task list in the Setup and Maintenance work area.

Manage Applications Core Messages

Messages: Explained

Messages provide users with information about business or application errors or warnings.

Typically, messages inform the users about the following:

- Missing or incorrect data
- Status of an application, page, or a business object
- Status of an ongoing process
- Result of a user action

Besides notifying users about the problem, messages provide guidance to users on taking corrective action. Messages also warn users about the consequences of a certain action.

Oracle provides a set of predefined messages that are stored in a message dictionary. To create additional messages or modify the existing ones, use the Manage Messages task in the Setup and Maintenance work area.

Note: Don't delete predefined messages unless you are sure that they aren't used anywhere.

Message Dictionary

The message dictionary stores messages that the application requires at run time. Messages are predefined for specific applications and modules, but a few are common messages that can be used in any application or module.

When you create messages, use the message text and the following components to cover additional details addressing users and help desk personnel:

- User Details: A detailed explanation of the message short text meant for users.
- Administrator Details: Details of the identified problem meant for the help desk personnel. The end users don't see this text.
- Cause: An end-user version of the cause of error.
- User Action: Instructions to users for addressing the identified problem. Where there is no guidance for end users, they must approach the help desk.
- Administrator Action: Corrective action that help desk personnel must take to correct the problem. This information is not available to the end users.

Message Types: Explained

All messages must be associated with a message type. You can select the message type based on the message severity.

The available message types are:

- Error
- Warning
- Information
- UI String

Error Messages

Use the Error message to inform users about, for example, entering incorrect data or performing actions that trigger validation. Error messages also inform users how to correct the situation so that they can continue with their task.

For example: You cannot specify a task without specifying the project.

Error messages also tell users about any serious problem with the application or process, and when they must seek assistance from the help desk. Some error messages trigger incidents or logs and have a mechanism to notify the help desk automatically.

Warning Messages

Use the Warning message type to inform users about an application condition or a situation that might require their decision before they can continue.

Warning messages:

- Describe the reason for the warning and potential consequence of the selected or intended user action.
- Can be either a question or a statement.

For example: You delete the primary user. Do you want to continue?

The message is usually followed by Yes and No buttons.

Information Messages

The Information message type tells users about changes in the application, a page, or a business object. These messages aren't triggered by users, and they don't have to take any immediate action in response.

For example: No events have been started or processed for this employee.

Use the Information message type to communicate information that is neither an error nor a warning.

UI String Messages

Use the UI string message type to store shorter messages such as UI prompts, titles, or translated text, in the message dictionary.

Grouping Messages by Category and Severity: Explained

You can group messages by severity to internally define logging and classifying incident policies. You can group by category based on the functionality or program.

Category and severity values do not appear in logging entries, incidents, or on the UI.

Note: The values in both options are predefined lookups but you can customize them. However, the maximum size of this field is 30 characters.

In the Setup and Maintenance work area, search for the Manage Messages task and use it to group the messages while creating or editing messages.

Group by Category

Use it to group messages that relate to one functionality, such as a scheduled process, together into one category. Select one of the predefined categories to enable automatic incident creation when the error message activates. By default, the following categories are available:

- **Product**: Issues related to product functionality, setup, and maintenance. Such messages are typically intended for functional administrators or product super users.
- **System**: Issues concerning the application, database, technology stack, and so on. Such messages are typically intended for technical users such as application administrators or database administrators.
- **Security**: Issues concerning permissions, access, compliance, passwords, and so on. Such messages are typically intended for security administrators.

Group by Severity

This grouping attribute is very specific and indicates the severity of the message. You must set the severity to High to enable automatic incident creation for the message. The following are predefined values, but you can add more if required.

- **High**: Used for serious messages that completely stop the progress of an important business process or affect a large user community, and require help desk's attention. Use this option to enable implicit incident creation for the message.
- **Medium**: Used for less severe and more isolated messages.
- **Low**: Used when you can't determine whether the message has a negative impact on end users or business processes.

Logging and Incidents

Select the **Logging Enabled** check box to include the UI message in the stored log file. To enable automatic incident creation when the error message appears on the UI, set the severity to High.

Incidents collect information about the application errors for which users may require assistance from help desk. An incident contains information about the state of the application at the time the problem occurred. Help desk can use the information in the incidents to resolve the problems.

You may examine the stored logs and incidents (not available in Oracle Cloud implementations). To understand more about incidents and log files, refer to the Oracle Fusion Applications Administrator's Guide.

Related Topics

- What's an incident?
- Diagnostic Tests: Examples
- Diagnostic Tests: Highlights

Creating and Editing a Message: Procedure

You may edit predefined messages stored in the message dictionary or create custom messages.

In the Setup and Maintenance work area, search for and open the Manage Messages task.

Creating a Message

To create a message, perform the following steps:

1. On the Manage Messages page, click the **New** icon.
2. On the Create Message page, enter details under each section.
3. In the Message Properties section:

    a. Enter a unique message name that helps you find your custom messages and avoid name conflicts with predefined messages. Use underscore as a separator if the name contains multiple parts.
    b. Select the application and module to associate the message with.
    c. Enter a unique number that can be used as an identifier for the message. Users can quote this number when they contact the help desk for assistance.

        Note: You may use any number between 10,000,000 and 10,999,999. This number range is allocated for your custom messages. At run time, this number appears along with the application code after the message text, for example FND-2774.

    d. In the Translation Notes field, enter a description of the message indicating its use.
    e. Select the relevant message type, category, and severity.
    f. Select the **Logging Enabled** check box to create incidents or logs when messages appear on the UI.
4. In the Message Text section:

    a. In the Short Text field, provide the actual message text that appears on the page at run time.

        The short text can include tokens that are placeholders for displaying dynamic values at run time. However, to support easy translation, keep the message length (including values of tokens) under 160 characters in American English.
    b. In the User Details field, enter information for the users to know why the message appeared. You can also include information for the users to resolve the issue themselves.

        If your Short Text component has tokens that expand the text beyond the 160-character limit, move that portion of text here.
    c. In the Administrator Details field, provide a detailed technical explanation of the message. This field is only visible to the help desk.
    d. In the Cause field, provide a concise explanation of why the message appears. This text is visible to the users.

        This information is optional and is only applicable to messages of type Error and Warning. However, if you mention the cause, you must mention in the User Action field the action that users must take.
    e. In the User Action field, enter the user action to guide the users with steps to respond to the message and complete the task.
    f. In the Administrator Action field, provide information that the help desk can use to resolve the problem.
5. In the Message Tokens section, define tokens that you want to use in this message.
6. Click **Save and Close**.

Editing a Message

You may edit a predefined message or a custom message that you created.

To edit a message, search for a message on the Manage Messages page and perform the following steps:

1. Select the existing message and click the **Edit** icon.
2. On the Edit Message page, modify the existing details as per the instructions provided in the Creating a Message procedure.

    Note: Don't edit the message number for predefined messages.

3. Click **Save and Close**.

Using Tokens in Messages: Points to Consider

Certain messages must display variable information at run time to help users clearly relate to the actual data and perform the required action. You can use tokens to contain variable values at run time, instead of writing a unique message for every possible situation.

Tokens are programmatic parts of message text that are placed within curly brackets when creating the message. Tokens serve as placeholders for the actual data. At run time, tokens dynamically display the actual text or value in the message, making a message specific to the situation. For example, the message "Enter an effective date that is the same as or later than `{MATURITY_DATE}`" contains the token `{MATURITY_DATE}`. At run time, instead of the token, the represented value (the actual date) appears. Thus, users see the message "Enter an effective date that is the same as or later than 25-APR-2015".

Use the Manage Messages task in the Setup and Maintenance work area to create and manage tokens. You must edit a message to define tokens for it. You can create tokens for a message and also delete them. However, you can't edit or delete the predefined tokens.

Token Definition

To define a token, you must provide the following information:

- A unique name for the token.
- The type of data that the token replaces at run time. Available types are Date, Number, or Text.
- A description about what the token represents at run time.

Guidelines

Follow these general guidelines while defining tokens:

- Use curly brackets and all uppercase letters for the token names.
- Use underscore as a separator for a name containing two words or more.
- Don't use a space between words.

Follow these specific guidelines for each token data type.

Data Type	Guideline
Text	Use tokens for substituting any variable text element that qualifies as a noun.
Number	Plan carefully while using tokens for numbers especially, where a token could refer to either a singular or a plural number. You can use tokens for numbers representing an order, customer, or any other business object bearing a numeric value.

Data Type	Guideline
Date	Clearly define the context of the date, such as the start date, or end date, or a date range.

Common Messages: Points to Consider

Message names that begin with FND_CMN are common messages. Each common message can appear in multiple places in any product family across Oracle Fusion Applications. For example, the FND_CMN_NEW_SRCH message can be used for any search to indicate that no results were found. Common messages of type error or warning are part of the message dictionary.

Creating and Editing Common Messages

You can create custom common messages for use in multiple places. However, ensure that you follow the predefined naming convention and numbering series associated with the application or module.

Note: Don't use FND_CMN as the prefix for your custom messages because all the predefined common messages begin with it.

Common messages can be used in any application. Therefore, consider the ramifications if you edit any aspect of the message, including incident and logging settings. Changes would be reflected in all instances where the message is used. For example, if you change the message text, ensure that the text is generic and applies to the entire site of Oracle Fusion Applications implementation.

How can I make message components visible only to specific users?

Use the Manage Administrator Profile Values task to determine the visibility of the message components. For the **Message Mode** profile option, set the profile value to either User or Administrator. Based on the set value, the administrator or user actions and details appear for the intended audience.

However, the message components are visible to the audience based on their predefined access rights. Anyone having a user level access can't view the Administrator message components. If you set the profile value to the administrators of a specific product, the message components are visible only to that specific audience.

Note: If you don't set any value to the profile option, the visibility of the message component is determined by the default profile option settings.

Related Topics

- Setting Profile Option Values: Procedure

Manage Applications Core Standard Lookups

Lookups: Explained

Lookups are lists of values in applications. You define a list of values as a lookup type consisting of a set of lookup codes, each code's translated meaning, and optionally a tag. End users see the list of translated meanings as the available values for an object.

Lookups provide a means of validation and lists of values where valid values appear on a list with no duplicate values. For example, an application might store the values Y and N in a column in a table, but when displaying those values in the user interface, Yes or No (or their translated equivalents) should be available for end users to select. For example, the two lookup codes Y and N are defined in the REQUIRED_INDICATOR lookup type.

In another example, a lookup type for marital status has lookup codes for users to specify married, single, or available legal partnerships.

Lookup Type	Lookup Code	Meaning	Tag
MAR_STATUS	M	Married	
	S	Single	
	R	Registered Partner	+NL
	DP	Domestic Partner	-FR, AU

In this case, tags are used for localizing the codes. All legislations list Married and Single. Only the Dutch legislation lists Registered Partner. And all legislations except France and Australia also list Domestic Partner.

When managing lookups, you need to understand the following.

- Using lookups in applications
- Customization levels
- Accessing lookups
- Enabling lookups
- The three kinds of lookups: standard, common, and set enabled

Using Lookups in Applications

Use lookups to provide validation or a list of values for a user input field in a user interface.

An example of a lookup used for validation is a flexfield segment using a table-validated value set with values from a lookup type. An example of a lookup in a list of values is a profile option's available values from which users select one to set the profile option. Invoice Approval Status gives the option of including payables invoices of different approval statuses in a report. The lookup code values include All, so that users can report by all statuses: Approved, Resubmitted for approval, Pending or rejected, and Rejected.

Customization Level

The customization level of a lookup type determines whether the lookups in that lookup type can be edited. This applies data security to lookups.

Some lookup types are locked so no new codes and other changes can be added during implementation or later, as needed. Depending on the customization level of a lookup type, you may be able to change the codes or their meanings. Some lookups are designated as extensible, so new lookup codes can be created during implementation, but the meanings of predefined lookup codes cannot be modified. Some predefined lookup codes can be changed during implementation or later, as needed.

The customization levels are user, extensible, and system. The following table shows which lookup management tasks are allowed at each customization level.

Allowed Task	User	Extensible	System
Deleting a lookup type	Yes	No	No
Inserting new codes	Yes	Yes	No
Updating start date, end date, and enabled fields	Yes	Yes, only if the code is not predefined data	No
Deleting codes	Yes	Yes, only if the code is not predefined data	No
Updating tags	Yes	No	No
Updating module	Yes	No	No

Predefined data means LAST_UPDATED_BY = SEED_DATA_FROM_APPLICATION.

If a product depends on a lookup, the customization level must be system or extensible to prevent deletion.

Once the customization level is set for a lookup type, it can't be modified. The customization level for lookup types created using the Define Lookups page is by default set at the User level.

Standard, Common, and Set-Enabled Lookups

The available kinds of lookups are as follows.

Lookup	Description
Standard	Lists the available codes and translated meanings
Set enabled	Additionally associates a reference data set with the lookup codes
Common	Legacy lookups

Standard lookups are the simplest form of lookup types consisting only of codes and their translated meaning. They differ from common lookups only in being defined in the standard lookup view.

Common lookups exist for reasons of backward compatibility and differ from standard lookups only in being defined in the common lookup view.

Set enabled lookup types store lookup codes that are enabled for reference data sharing. At runtime, a set-enabled lookup code is visible because the value of the determinant identifies a reference data set in which the lookup code is present.

Accessing Lookups

Standard, set-enabled, and common lookups are defined in the Standard, Set-enabled, and Common views, respectively. Applications development may define lookups in an application view to restrict the UI pages where they may appear.

In lookups management tasks, lookups may be associated with a module in the application taxonomy to provide criteria for narrowing a search or limiting the number of lookups accessed by a product specific task such as Manage Purchasing Lookups.

Enabling Lookups

A lookup type is reusable for attributes stored in multiple tables.

Enable lookups based on the following.

- Selecting an **Enabled** check box
- Specifying an enabled start date, end date, or both
- Specifying a reference data setdeterminant

If you make changes to a lookup, users must sign out and back in before the changes take effect. When defining a list of values for display rather than validation, limit the number of enabled lookup codes to a usable length.

For more information on the predefined lookups and lookup codes, open the Setup and Maintenance work area, and use the tasks in the Define Lookups task list.

Translating Lookups

You can translate the lookups that you defined to the preferred language(s) without changing the language session of the application. Use the translation option available on the lookup code table. By default, for each lookup, all the allowed language rows in the translator dialog box appear in the source language (the current session language). When you edit a particular language entry, you can modify the translated meaning and description to the language in which you want the lookup to appear. Once the updates are made, the end-users can view the lookup in the translated text.

Note: You can add the translation for only as many languages as are permitted by the administrator. The functionality to limit the number of languages displayed on the dialog box is controlled through the Translation Editor Languages profile option. It can be set at the SITE or USER level. If nothing is specified, all active languages are displayed.

Managing a Standard Lookup: Example

Creating a new standard lookup involves creating or selecting a lookup type containing the lookup code. The task also involves determining appropriate values for the lookup codes and their meanings. You can only create or edit lookup codes for a particular lookup type if its customization level supports it.

Creating a Lookup Type Called COLORS

Your enterprise needs a list of values for status to be used on various objects such as processes or users. The lookups are colors, so the lookup type you create is COLORS.

Lookup type parameters	Value
Lookup type name	COLORS
Meaning	Status
Description	Status by color
Module	Oracle Fusion Middleware Extensions for Oracle Application

Lookup type parameters	Value

The lookup codes you define for the COLORS lookup type are, BLUE, RED, GREEN, and YELLOW.

Lookup Code	Meaning	Enabled	Display Sequence
BLUE	Urgent	No	4
RED	Stop	Yes	1
GREEN	Proceed	Yes	3
YELLOW	Caution	Yes	2

The Resulting Data Entry List of Values

The enabled lookup codes appear in the list of values for the COLORS lookup type. You must select one of them to complete the activity.

The meanings and the codes are listed here. They appear in the order of the defined display sequence.

Displayed Value	Hidden ID
Stop	RED
Caution	YELLOW
Proceed	GREEN

Analysis

The BLUE lookup code was not enabled and does not appear in the list of values. The display sequence of values in the list of values is alphabetic, unless you enter a number manually to determine the order of appearance. Number 1 indicates the first value that appears in the list. Only lookups that are enabled and active between start and end dates, are visible.

The Transaction Table

When users enter one of the values from the list of values for the lookup type COLORS, the transaction table records the lookup code. In this example, the code is stored in the Status column

Transaction number	User name	Status
1	Jane	RED
2	Bob	YELLOW
3	Alice	BLUE

Transaction number	User name	Status

The status for one user is BLUE because at the time they entered a value, BLUE was enabled. Disabling a lookup code does not affect transaction records in which that code is stored. Data querying and reporting have access to disabled lookup codes in transaction tables.

Managing Set-Enabled Lookups: Examples

Creating a new set-enabled lookup is similar to creating a standard lookup with the addition of specifying a reference data setdeterminant for the lookup codes. You can only create or edit lookup codes for a particular lookup type if its customization level supports it.

The reference data set for a set-enabled lookup code is part of its foreign key. This is unlike other set-enabled entities. Use the Manage Set Assignments task to define and manage reference data set assignments.

Selecting a Reference Group for a Set-Enabled Lookup Type

Specify a reference group for a set-enabled lookup type to indicate which reference data set assignments are available for its lookup codes. For example a COLORS lookup type might be set-enabled for a Countries reference group that includes the US and EU reference data set assignments.

Selecting a Reference Data Set for a Set-Enabled Lookup

The reference data set determines which lookup code is included in the list of values. If a COLORS lookup type contains a RED, YELLOW, ORANGE, and GREEN lookup code, you can enable one RED lookup as coming from the US reference data set and another RED lookup as coming from the EU reference data set with different meanings.

Reference Data Set	Lookup Code	Lookup Meaning
US	RED	Red
US	YELLOW	Yellow
US	GREEN	Green
EU	RED	Rouge
EU	ORANGE	Orange

Some lookup codes may be unique to one or another reference data set as the ORANGE lookup is to the EU reference data set in this example.

In another example, a lookup type called HOLD_REASON provides a list of reasons for applying a hold to a contract renewal. Reference data sets determine which codes are included in the Hold Reason list of values.

Reference Data Set	Lookup Code	Lookup Meaning
US	SEC	SEC Compliance Review
US	DIR	Needs Director's Approval

Reference Data Set	Lookup Code	Lookup Meaning
US	VP	Needs Vice President's Approval
CHINA	CSRC	Pending China Securities Regulatory Commission Review
CHINA	PR	Needs President's Approval
COMMON	REQUESTED	Customer Request

As per the above example, when end-users place a contract on hold in the US business unit, the three reason codes in the US set are available. When placing a contract on hold in the China business unit, the two codes in the China set are available.

FAQs for Manage Applications Core Standard Lookups

How can I access predefined lookups?

Search for predefined lookups using the Define Lookups task list:

1. In the Setup and Maintenance work area, search for the **Define Lookups** task list and expand it to view the tasks.
2. Open the task that corresponds to the lookups you are searching for.
3. Enter any of the search parameters and click **Search**. If you don't know the lookup type or the meaning, use the **Module** field to filter search results.
4. Click a lookup type to view its lookup codes.

Tip: Click the Query By Example icon to filter the lookup codes.

Related Topics

- Using Query By Example: Procedure

How can I edit lookups?

On the Define Lookups page, you can edit the existing lookup codes of a lookup type or add new lookup codes. To open the page, navigate to the Setup and Maintenance work area and search for the Define Lookup task list.

The task list contains three tasks:

- Standard Lookups
- Common Lookups
- Set-enabled Lookups

Each task contains a predefined set of lookup types classified and stored as per the functionality. Open a task to search and edit the required lookup. However, you may not be able to edit a lookup if its customization level doesn't support editing.

Why can't I see my lookup types?

Lookup types are classified using tasks that involve a group of related lookups, such as Manage Geography Lookups. Each task gives you access only to certain lookup types. However, the generic tasks provide access to all lookups types of a kind, such as common lookups associated with the Manage Common Lookups task.

If the lookup types in an application are available in the standard, common, or set-enabled lookups view, they are central to an application. However, lookup types defined for a specific application are managed using the task or task list for that application.

What's the difference between a lookup type and a value set?

A lookup type consists of lookups that are static values in a list of values. Lookup code validation is a one to one match.

A table-validated value set may consist of values that are validated through a SQL statement, which allows the list of values to be dynamic.

Tip: You can define a table-validated value set on any table, including the lookups table. Thus, you can change a lookup type into a table-validated value set that can be used in flexfields.

Area of Difference	Lookup Type	Value Set
List of values	Static	Dynamic if the list is table-validated
Validation of values	One to one match of meaning to code included in a lookup view, or through the determinant of a reference data set	Validation by format or inclusion in a table
Format type of values	char	varchar2, number, and so on
Length of value	Text string up to 30 characters	Any type of variable length from 1 to 4000
Duplication of values	Never. Values are unique.	Duplicate values allowed
Management	Both administrators and end-users manage these, except system lookups or predefined lookups at the system customization level, which can't be modified.	Usually administrators maintain these, except some product flexfield codes, such as GL for Oracle Fusion General Ledger that the end-users maintain.

Both lookup types and value sets are used to create lists of values from which users select values.

A lookup type cannot use a value from a value set. However, value sets can use standard, common, or set-enabled lookups.

What's a lookup tag used for?

A tag is an additional label attached to the lookup. Tags are user defined and can be grouped depending on the user's requirement to make search convenient and effective.

The same tag may be used across lookup categories. In such cases, tags are used as a refined search criterion to filter information across several groups and get the custom search result.

How can I search for a specific lookup code?

Use the Query By Example functionality to sort through hundreds of lookup codes for a lookup type, and display a specific lookup code. Enter the first few characters of the lookup code value in any of the relevant fields to filter the records.

Note: The search functionality is case sensitive.

Manage Applications Core Administrator Profile Values

Profile Options and Related General Preferences: How They Work Together

The general preferences such as Language, Territory, or Date Format that you access from the global area have corresponding predefined profile options.

General Preferences

When users define their preferred Date Format, Language, or Currency, they are setting the value of a profile option at the user level.

Profile Options

When users don't specify anything as their preferences, the Site level profile option takes effect.

Setting Up for General Troubleshooting: Points to Consider

To help the help desk troubleshoot issues that users encounter in the application, users can record the issue while they reproduce it. Some advanced users might also need detailed information in the About This Page dialog box. Setting up for troubleshooting involves making sure that users have the right access, and determining how many users can record at the same time.

Access

Check with your security administrator that the appropriate users are assigned roles that inherit the following privileges:

- **Record and View Issue (FND_RECORD_AND_VIEW_ISSUE_PRIV):** To create a basic recording
- **Set Issue Recording Advanced Options (FND_SET_ISSUE_RECORDING_ADVANCED_OPTIONS_PRIV):** To set advanced options before starting the recording
- **View Version Information (FND_VIEW_VERSION_INFORMATION_PRIV):** To see the versions that technical components of the application are on

Number of Users

Recordings are stored on servers, and by default, up to five users can record at the same time on each server. For performance reasons, you can set the Maximum Number of Users Allowed to Record Issues (ORA_FND_RECORD_ISSUE_MAX_USERS) profile option to a number lower than five.

Related Topics

- Recording Issues to Troubleshoot: Procedure
- How can I view the version information of an application?
- Setting Profile Option Values: Procedure

Managing Profile Option Values for CORS Headers: Points to Consider

You can set profile option values for the CORS headers using the Manage Administrator Profile Values task in the Setup and Maintenance work area.

CORS Headers

This table lists the CORS headers that you can set profile option values for.

CORS Header	Profile Option Name (Profile Option Code)	Profile Option Values
Access-Control-Allow-Origin	Allowed Domains (ORACLE. ADF. VIEW. ALLOWEDORIGINS)	Valid values for allowed origins: • URL of the specific origin, for example, http://www.mydomain.com • Comma-separated list of origins, for example, http://www.mydomain.com, http://adc6160507.us.oracle.com, http://software.dzhuvinov.com • * to allow access to resources from all origins • Empty (no value set) to prevent access to resources from any origin **Note:** You must set a value for this header to enable CORS.
Access-Control-Max-Age	CORS: Access-Control-Max-Age (CORS_ ACCESS_ CONTROL_ MAX_AGE)	Default value for caching preflight request is 3600 seconds.
Access-Control-Allow-Methods	CORS: Access-Control-Allow-Methods (CORS_ ACCESS_ CONTROL_ ALLOW_ METHODS)	Default values for allowed methods are **OPTIONS**, **HEAD**, **GET**, **POST**, **PUT**, **PATCH**, **DELETE**.
Access-Control-Allow-Headers	CORS: Access-Control-Allow-Headers (CORS_ ACCESS_ CONTROL_ ALLOW_ HEADERS)	Default values for allowed headers are **Accept**, **Accept-Encoding**, **Cache-Control**, **Content-MD5**, **Content-Type**, **If-Match**, **If-None-Match**,**Origin**, **User-Agent**, **X-HTTP-Method-Override**, **X-Requested-By**. **Note:** You must include `Authorization`, with a comma as the delimiter, to the list of allowed headers. For example: **Accept**, **Accept-Encoding**, **Cache-Control**, **Authorization**
Access-Control-Allow-Credentials	CORS: Access-Control-Allow-Credentials (CORS_ ACCESS_ CONTROL_ ALLOW_ CREDENTIALS)	• **True** to enable sending credentials with the request

CORS Header	Profile Option Name (Profile Option Code)	Profile Option Values
		• **False**, which is the default value, to disable sending credentials with the request

Related Topics

- Setting Profile Option Values: Procedure
- CORS: Explained

How can I enable the privacy statement?

In the Setup and Maintenance work area, open the Manage Applications Core Administrator Profile Values task and search for the **Privacy Statement URL** profile option. In the profile values section, update the **Profile Value** text box with the full URL of the web page containing the privacy content.

In the global area, click your user name and from the Settings and Actions menu, select **About This Page.**. Click **Privacy Statement** to view the linked web page.

How can I make message components visible only to specific users?

Use the Manage Administrator Profile Values task to determine the visibility of the message components. For the **Message Mode** profile option, set the profile value to either User or Administrator. Based on the set value, the administrator or user actions and details appear for the intended audience.

However, the message components are visible to the audience based on their predefined access rights. Anyone having a user level access can't view the Administrator message components. If you set the profile value to the administrators of a specific product, the message components are visible only to that specific audience.

Note: If you don't set any value to the profile option, the visibility of the message component is determined by the default profile option settings.

Related Topics

- Setting Profile Option Values: Procedure

Manage Applications Core Value Sets

Value Sets: Explained

A value set is a group of valid values that you assign to a flexfield segment to control the values that are stored for business object attributes.

An end user enters a value for an attribute of a business object while using the application. The flexfield validates the value against the set of valid values that you configured as a value set and assigned to the segment.

For example, you can define a required format, such as a five digit number, or a list of valid values, such as green, red, and blue.

Flexfield segments are usually validated, and typically each segment in a given flexfield uses a different value set. You can assign a single value set to more than one segment, and you can share value sets among different flexfields.

Note: Ensure that changes to a shared value set are compatible with all flexfields segments using the value set.

The following aspects are important in understanding value sets:

- Managing value sets
- Validation
- Security
- Precision and scale
- Usage and deployment
- Protected value set data

Managing Value Sets

To access the Manage Value Sets page, use the Manage Value Sets task, or use the Manage Descriptive Flexfields and Manage Extensible Flexfields tasks for configuring a segment, including its value set. To access the Manage Values page, select the value set from the Manage Value Sets page, and click **Manage Values**. Alternatively, click **Manage Values** from the Edit Value Set page.

Validation

The following types of validation are available for value sets:

- Format only, where end users enter data rather than selecting values from a list
- Independent, a list of values consisting of valid values you specify
- Dependent, a list of values where a valid value derives from the independent value of another segment
- Subset, where the list of values is a subset of the values in an existing independent value set
- Table, where the values derive from a column in an application table and the list of values is limited by a WHERE clause

A segment that uses a format only value set doesn't present a list of valid values to users. Adding table validated value sets to the list of available value sets available for configuration is considered a custom task.

Note: For the Accounting Key Flexfield value sets, you must use independent validation only. If you use other validations, you can't use the full chart of accounts functionality, such as data security, reporting, and account hierarchy integration.

Security

Value set security only works in conjunction with usage within flexfield segments. You can specify that data security be applied to the values in flexfield segments that use a value set. Based on the roles provisioned to users, data security policies determine which values of the flexfield segment end users can view or modify.

The application of value set security has the following conditions:

- At the value set level: The value set is the resource secured by data security policies. If a value set is secured, every usage of it in any flexfield is secured. It isn't possible to disable security for individual usages of the same value set.
- Applies to independent, dependent, or table-validated value sets.
- Applies mainly when data is being created or updated, and to key flexfield combinations tables for query purposes. Value set security doesn't determine which descriptive flexfield data is shown upon querying.

- Security conditions defined on value sets always use table aliases. When filters are used, table aliases are always used by default. When predicates are defined for data security conditions, make sure that the predicates also use table aliases.

For key flexfields, the attributes in the view object that correspond to the code combination ID (CCID), structure instance number (SIN), and data set number (DSN) cannot be transient. They must exist in the database table. For key flexfields, the SIN segment is the discriminator attribute, and the CCID segment is the common attribute.

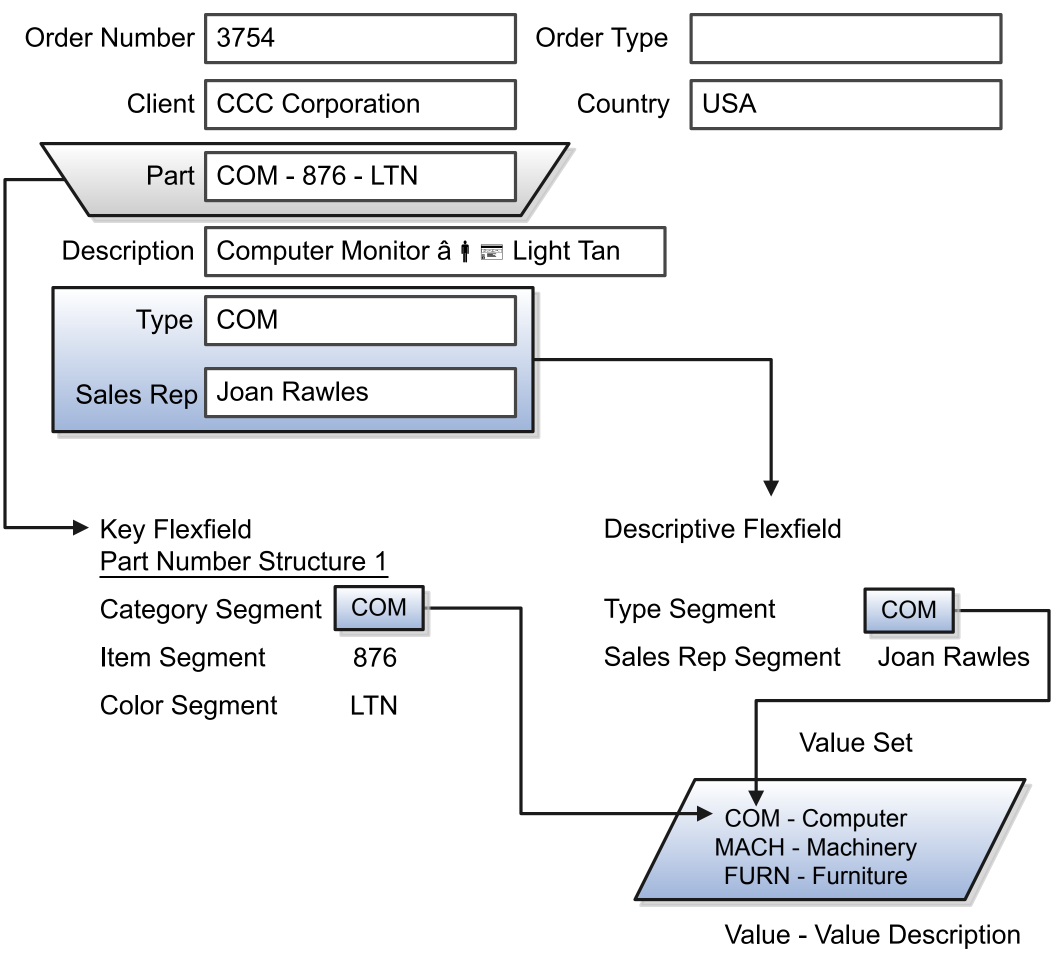
Precision and Scale

If the data type of a value set is Number, you can specify the precision (maximum number of digits user can enter) or scale (maximum number of digits following the decimal point).

Usage and Deployment

The usage of a value set is the flexfields where that value set is used. The deployment status of flexfields in which the value set is used indicates the deployment status of the value set instance.

The figure shows a value set used by a segment in a key flexfield and the context segment of a descriptive flexfield.



For most value sets, when you enter values into a flexfield segment, you can enter only values that already exist in the value set assigned to that segment.

Global and context-sensitive segment require a value set. You can assign a value set to a descriptive flexfield context segment. If you specify only context values, not value sets for contexts, the set of valid values is equal to the set of context values.

Protected Value Set Data

Application developers may mark some value sets as protected, indicating that you can't edit them.

You can edit only value sets that are not marked as protected. You can't edit or delete protected value sets. If the value set type supports values (such as independent, dependent or subset value sets), then you can't add, edit, or delete values.

> **Note:** There is no restriction on references to protected value sets. Value sets, protected or not, may be assigned to any flexfield segment. Likewise, other value sets may reference protected value sets; for example, an unprotected dependent value set may reference a protected independent value set.

Related Topics

- Flexfields and Value Sets: How They Work Together
- Chart of Accounts: How Its Components Fit Together
- Why can't I edit my flexfield or value set configuration?
- Defaulting and Deriving Segment Values: Explained

Defining Value Sets: Critical Choices

Validation and usage of value sets determine where and how users access valid values for attributes represented by flexfield segments.

> **Tip:** As a flexfield guideline, define value sets before configuring the flexfield, because you can assign value sets to each segment as you configure a flexfield. With descriptive and extensible flexfield segments, you can create value sets when adding or editing a segment on the run time page where the flexfield appears.

The following aspects are important in defining value sets:

- Value sets for context segments
- Format-only validation
- Interdependent value sets
- Table validation
- Range
- Security
- Testing and maintenance

Value Sets for Context Segments

When assigning a value set to a context segment, you can only use table-validated or independent value sets.

You can use only table and independent value sets to validate context values. The data type must be character and the maximum length of the values being stored must not be larger than the context's column length. If you use a table value set, the value set cannot reference flexfield segments in the value set's WHERE clause other than the flexfield segment to which the value set is assigned.

Format Only Validation

The format only validation type enables users to enter any value, as long as it meets your specified formatting rules. The value must not exceed the maximum length you define for your value set, and it must meet any format requirements for that value set.

For example, if the value set permits only numeric characters, users can enter the value 456 (for a value set with maximum length of three or more), but can't enter the value ABC. A format only value set doesn't otherwise restrict the range of different values that users can enter. For numeric values, you can also specify if a numeric value should be zero filled or how may digits should follow the radix separator.

Interdependent Value Sets

Use an independent value set to validate data against a list that isn't stored in an application table, and not dependent on a subset of another independent value set. You cannot specify a dependent value set for a given segment without having first defined an independent value set that you apply to another segment in the same flexfield. Use a dependent value set to limit the list of values for a given segment based on the value that the user has defined for a related independent segment. The available values in a dependent list and the meaning of a given value depend on which value was selected for the independently validated segment.

For example, you could define an independent value set of the states in the USA with values such as CA, NY, and so on. Then you define a dependent value set of cities in the USA with values such as San Francisco and Los Angeles that are valid for the independent value CA. Similarly, New York City and Albany are valid for the independent value NY. In the UI, only the valid cities can be selected for a given state.

Because you define a subset value set from an existing independent value set, you must define the independent value set first. Users don't have to select a value for another segment first to have access to the subset value set.

Independent, dependent, and subset value sets require a customized list of valid values. Use the Manage Values page to create and manage a value set's valid values and the order in which they appear.

> **Tip:** You can customize the Manage Value Sets page to capture additional attributes for each valid value by adding context-sensitive segments in a new context for FND_VS_VALUES_B descriptive field.

Table Validation

Typically, you use a table-validated set when the values you want to use are already maintained in an application table, such as a table of supplier names. Specify the table column that contains the valid value. You can optionally specify the description and ID columns, a WHERE clause to limit the values to use for your set, and an ORDER BY clause.

If you specify an ID column, then the flexfield saves the ID value, instead of the value from the value column, in the associated flexfield segment. If the underlying table supports translations, you can enable the display of translated text by basing the value set's value column on a translated attribute of the underlying table. You should also define an ID column that is based on an attribute that isn't language-dependent so that the value's invariant ID (an ID that doesn't change) is saved in the transaction table. The run time displays the corresponding translated text from the value column for the run time session's locale.

Table validation lets you enable a segment to depend upon multiple prior segments in the same context structure. You cannot reference other flexfield segments in the table-validated value set's WHERE clause. That is, the WHERE clause cannot reference SEGMENT.segment_code or VALUESET.value_set_code.

Table-validated value sets have unique values across the table, irrespective of bind variables. The WHERE clause fragment of the value set is considered if it doesn't have bind variables. If it has bind variables, the assumption is that the values are unique in the value set. If you use table validated value sets for key flexfields, then you can't use all integration functionalities supported for key flexfields, such as:

- Data security

- Oracle Transactional Business Intelligence (OTBI)
- Extended Spread Sheet Database (ESSbase)
- Tree or hierarchy integration

To use these integration functionalities for key flexfields, you must use independent value sets only.

Range

In the case of format, independent, or dependent value sets, you can specify a range to limit which values are valid. You can specify a range of values that are valid within a value set. You can also specify a range validated pair of segments where one segment represents the low end of the range and another segment represents the high end of the range.

For example, you might specify a range for a format-only value set with format type Number where the user can enter only values between 0 and 100.

Security

In the case of independent and dependent values, you can specify that data security be applied to the values in segments that use a value set. Based on the roles provisioned to users, data security policies determine which values of the flexfield segment users can view or modify.

To enable security on a value set, specify a database resource, typically the code value for the value set. Using the Manage Database Security Policies task, specify conditions, such as filters or SQL predicates, and policies that associate roles with conditions. You can use a filter for simple conditions. For more complex conditions, use a SQL predicate.

Value set data security policies and conditions differ from data security conditions and policies for business objects in the following ways:

- You can grant only read access to users. You cannot specify any other action.
- When defining a condition that is based on a SQL predicate, use VALUE, VALUE_NUMBER, VALUE_DATE, VALUE_TIMESTAMP, or VALUE_ID to reference the value from a dependent, independent, or subset value set. For table value sets, use a table alias to define the table, such as &TABLE_ALIAS category=70.

When you enable security on table-validated value sets, the security rule that is defined is absolute and not contingent upon the bind variables (if any) that may be used by the WHERE clause of the value set. For example, suppose a table-validated value set has a bind variable to further filter the value list to x, y and z from a list of x, y, z, xx, yy, zz. The data security rule or filter written against the value set must not assume anything about the bind variables. Instead the whole list of values must be available and you write the rule, for example, to permit x, or to permit y and z. By default in data security, all values are denied and show only rows to which access has been provided.

Testing and Maintenance

You don't have to define or maintain values for a table-validated value set, as the values are managed as part of the referenced table or independent value set, respectively.

You cannot manage value sets in a sandbox.

When you change an existing value set, the deployment status for all affected flexfields changes to Edited. You must redeploy all flexfields that use that value set to make the flexfields reflect the changes. In the UI pages for managing value sets, the value set's usages show which flexfields are affected by the value set changes.

If your application has more than one language installed, or there is any possibility that you might install one or more additional languages for your application in the future, select **Translatable**. This doesn't require you to provide translated values now, but you cannot change this option if you decide to provide them later.

Planning Value Sets: Points to Consider

The value sets you create and configure depend on the valid values on the business object attributes that will use the value set. When creating value sets, you first give the value set a name and description, and then define the valid values of the set.

The following aspects are important in planning value sets:

- List of values
- Plain text input
- Value ranges
- Value format specification
- Security

List of Values

You can use one of the following types of lists to specify the valid values for a segment:

- Table column
- Custom list. Also include a sub list.
- Dependent custom list

If the valid values exist in a table column, use a table value set to specify the list of values. To limit the valid values to a subset of the values in the table, use a SQL WHERE clause. Table value sets also provide some advanced features, such as enabling validation depending on other segments in the same structure.

Use an independent value set to specify a custom set of valid values. For example, you can use an independent value set of Mon, Tue, Wed, and so forth to validate the day of the week. You can also specify a subset of an existing independent value set as the valid values for a segment. For example, if you have an independent value set for the days of the week, then a weekend subset can be composed of entries for Saturday and Sunday.

Use a dependent value set when the available values in the list and the meaning of a given value depend on which independent value was selected for a previously selected segment value. For example, the valid holidays depend on which country you are in. A dependent value set is a collection of value subsets, with one subset for each value in a corresponding independent value set.

For lists of values type value sets, you can additionally limit the valid values that an end user can select or enter by specifying format, minimum value, and maximum value. For list of values type value sets, you can optionally implement value set data security. If the Oracle Fusion applications are running in different locales, you might need to provide different translations for the values and descriptions.

Plain Text Input

Use a format-only value set when you want to allow end users to enter any value, as long as that value conforms to formatting rules. For example, if you specify a maximum length of 3 and numeric-only, then end users can enter 456, but not 4567 or 45A. You can also specify the minimum and maximum values, whether to right-justify, and whether to zero-fill. With a format-only value set, no other types of validation are applied.

Value Ranges

You can use either a format-only, independent, or dependent value set to specify a range of values. For example, you might create a format-only value set with Number as the format type where the end user can enter only the values between 0 and 100. Or, you might create a format-only value set with Date as the format type where the end user can enter only dates for a specific year, such as a range of 01-JAN-93 to 31-DEC-93. Because the minimum and maximum values enforce these limits, you need not define a value set that contains each of these individual numbers or dates.

Value Format

Flexfield segments commonly require some kind of format specification, regardless of validation type. Before creating a value set, consider how you will specify the required format.

The following table shows options for validation type and value data type.

Option	Description
Value data type	Character, Number, Date, Date Time.
Value subtype	Text, Translated text, Numeric digits only, Time (20:08), Time (20:08:08). An additional data type specification for the Character data type for the Dependent, Independent, and Format validation types.
Maximum length	Maximum number of characters or digits for Character data type.
Precision	Maximum number of digits the user can enter.
Scale	Maximum number of digits that can follow the decimal point.
Uppercase only	Lowercase characters automatically changed to uppercase.
Zero fill	Automatic right-justification and zero-filling of entered numbers (affects values that include only the digits 0-9).

Note: You cannot change the text value data type to a translated text value subtype after creating a value set. If there is any chance you may need to translate displayed values into other languages, choose Translated text. Selecting the Translated text subtype doesn't require you to provide translated values.

Value Sets for Context Segments

You can use only table and independent value sets to validate context values. The data type must be character and the maximum length of the values being stored must not be larger than the context's column length. If you use a table value set, the value set cannot reference flexfield segments in the value set's WHERE clause other than the flexfield segment to which the value set is assigned.

Security

When enabling security on a value set, the data security resource name is an existing value set or one that you want to create. The name typically matches the code value for the value set. You cannot edit the data security resource name after you save your changes.

Related Topics

- Flexfields and Value Sets: How They Work Together
- Defaulting and Deriving Segment Values: Explained

Table-Validated Value Sets and Bind Variables: Points to Consider

After you assign a value set to a flexfield, you can use bind variables in the WHERE clause.

The following bind variables refer to flexfield elements:

- `:{SEGMENT.<segment_code>}`
- `:{CONTEXT.<context_code>;SEGMENT.<segment_code>}`
- `:{VALUESET.<value_set_code>}`
- `:{FLEXFIELD.<internal_code>}`
- `:{PARAMETER.<parameter_code>}`

Segment Code

`:{SEGMENT.<segment_code>}`

This bind variable refers to the ID or value of a segment where `<segment_code>` identifies the segment. Where referring to the ID, the value set is ID-validated. Where referring to the value, the value set isn't ID-validated. The data type of the bind value is the same as the data type of the segment's column.

For both descriptive and extensible flexfields, the segment must be in the same context as the source segment. The source segment contains the WHERE clause. For descriptive flexfields, if the segment is global, then the source segment must be global.

The segment must have a sequence number that is less than the sequence number of the target segment with this bind variable. A matching segment must exist in the current flexfield context.

This bind variable is useful when the set of valid values depends on the value in another segment. For example, the values to select from a CITIES table might depend upon the selected country. If SEGMENT1 contains the country value, then the WHERE clause for the CITIES table might be `<country_code> = :{SEGMENT.SEGMENT1}`.

Context Code

`:{CONTEXT.<context_code>;SEGMENT.<segment_code>}`

This bind variable, which is valid only for extensible flexfields, refers to the ID (if the value set is ID-validated) or value (if not ID-validated) of a segment that is in a different context than the target segment (the segment with the WHERE clause).

- The `<context_code>` identifies the context and must be in the same category or in an ancestor category. It cannot be a multiple-row context.
- The `<segment_code>` identifies the segment. The data type of the bind value is the same as the data type of the segment's column.

Note: The target segment should appear in the UI after the source segment to ensure the source segment has a value. If the target segment's context is a single-row context, the source and target segments must be on separate pages and the target page must follow the source page.

The framework of extensible flexfields doesn't perform any additional validation related to mismatched values for segments defined with cross context bind parameters. Administrators must populate the correct pair of segment values.

This bind variable is useful when the set of valid values depends on the value of a segment in another context. For example, the values to select from a CERTIFICATION table for a segment in the Compliance and Certification context might depend on the value of the country segment in the Manufacturing context.

Value Set Code

:{VALUESET.<value_set_code>}

This bind variable refers to the ID (if the value set is ID-validated) or value (if not ID-validated) of the segment that is assigned to the value set that is identified by the **value_set_code**. The data type of the bind value is the same as the data type of the segment's column.

The segment must have a sequence number that is less than the sequence number of the segment with this bind variable. If more than one segment is assigned to the value set, the closest prior matching segment will be used to resolve the bind expression. A matching segment must exist in the current flexfield context.

This bind variable is useful when the set of valid values depends on the value in another segment and that segment code can vary, such as when the value set is used for more than one context or flexfield. For example, the values to select from a CITIES table might depend upon the selected country. If the value set for the segment that contains the country value is COUNTRIES, then the WHERE clause for the CITIES table might be **<country_code> = :{VALUESET.COUNTRIES}.**

Flexfield Internal Code

:{FLEXFIELD.<internal_code>}

This bind variable refers to an internal code of the flexfield in which the value set is used, or to a validation date. The internal_code must be one of the following:

- APPLICATION_ID - the application ID of the flexfield in which this value set is used. The data type of APPLICATION_ID and its resulting bind value is NUMBER.
- DESCRIPTIVE_FLEXFIELD_CODE - the identifying code of the flexfield in which this value set is used. The data type of DESCRIPTIVE_FLEXFIELD_CODE and its resulting bind value is VARCHAR2. Note that you use this string for both descriptive and extensible flexfields.
- CONTEXT_CODE - the context code of the flexfield context in which this value set is used. The data type of CONTEXT_CODE and its resulting bind value is VARCHAR2.
- SEGMENT_CODE - the identifying code of the flexfield segment in which this value set is used. The data type of SEGMENT_CODE and its resulting bind value is VARCHAR2.
- VALIDATION_DATE - the current database date. The data type of VALIDATION_DATE and its resulting bind value is DATE.

Flexfield Parameters

:{PARAMETER.<parameter_code>}

This bind variable refers to the value of a flexfield parameter where parameter_code identifies the parameter. The data type of the resulting bind value is the same as the parameter's data type.

> **Note:** You cannot assign a table value set to a context segment if the WHERE clause uses VALUESET.value_set_code or SEGMENT.segment_code bind variables.

Table-Validated Value Set: Worked Example

In an application user interface, you want to display a list of values that allow customers to enter satisfaction scores. The value column name is 1, 2, 3, 4, 5 and the value column description is Extremely Satisfied, Satisfied, and so on. Users can pick the appropriate value or description which stores the corresponding name so the name value can be used in a calculation expression.

In this case, you can use the FND_LOOKUPS table as the basis for a table-validated value set. The lookup meaning corresponds to the Value Column Name and the lookup description corresponds to the Description Column Name. The properties of the value set are as follows:

Property	Value
FROM clause	FND_LOOKUPS
WHERE clause	lookup_type = 'CN_ XX_ CUST_ SATISFACT_ SCORE'
ID column	lookup_code
Value column	meaning
Description column	description
Enable Flag column	enabled_flag
Start Date column	start_ date_active
End Date column	end_ date_active
Order by	display_ sequence

After completing this task, you should have created your customer satisfaction value set for the Incentive Compensation page of your implementation project.

Creating a Value Set Based on a Lookup

1. From the Setup and Maintenance work area, find the Manage Value Sets task and click the **Go to Task** icon button.
2. On the Manage Value Sets page, click the **Create** icon button.
3. On the Create Value Set page, enter the following values:
   a. In the Value Set Code field, enter CN_XX_CUSTOMER_SATISFACTION_SCORES
   b. In the Description field, enter Customer satisfaction score.
   c. In the Module field, select **Search....**
   d. In the Search and Select: Module subwindow, enter `Incent` in the User Module Name field
   e. Select Incentive Compensation.
   f. Click **OK**.
4. On the Create Value Set page, enter the following values:
   a. In the Validation Type field, select Table.
   b. In the Value Data Type field, select Character.
   c. In the Definition section FROM Clause field, enter FND_LOOKUPS.
   d. In the Value Column Name field, enter DESCRIPTION.
   e. In the Description Column Name field, enter MEANING.
   f. In the ID Column Name field, enter LOOKUP_CODE.
   g. In the Enabled Flag Column Name field, enter 'Y'.
   h. In the Start Date Column Name field, enter START_DATE_ACTIVE.

   i. In the End Date Column Name field, enter END_DATE_ACTIVE.
   j. In the WHERE Clause field, enter LOOKUP_TYPE = 'CN_XX_CUST_SATISFACT_SCORE'.
5. Click **Save and Close**.
6. In the Manage Value Sets page, click **Done**.

Adding Attributes to the Manage Value Sets Page: Procedures

You can add attributes to independent, dependent, and subset value sets. The attributes appear on the Manage Value Sets page where you can store additional information about each valid value. To display attributes on an application page, you must programmatically modify the application.

To add attributes and subsequently view them on the Manage Value Sets page, perform the following steps:

1. Using the Manage Descriptive Flexfields task, find the FND_VS_VALUES_B flexfield and open it for editing.
2. Click **Manage Contexts**.
3. Create a new context and use the value set code for the context code.
4. Add new attributes as context-sensitive segments and save the changes.
5. Deploy FND_VS_VALUES_B to run time.
6. Sign out and sign back in.
7. Open the Manage Value Sets page to view the new attributes.

Importing Value Set Values: Procedure

You can import a file containing values that you want to edit or add to a given independent or dependent value set.

For example, uploading a hundred values may be more efficient than creating them individually using the Manage Value Sets task. However, for just a few values, it may be quicker to perform the relevant tasks.

Importing Value Set Values

To import value set values:

1. Create a flat file containing the values in the value set that you want to add or update.

   Note:
   - When creating the file, you must specify an existing value set code to which you want to add values or edit existing values. If the value set does not exist, add the value set using the appropriate Manage Value Sets setup task in the Setup and Maintenance work area.
   - The file that you create must adhere to the formatting and content requirements for creating flat files containing value set values.
2. Upload the flat file to the content repository using the Files for Import and Export page.
3. Import the file using the appropriate Manage Value Sets setup task in the Setup and Maintenance work area. To import the file:
   a. Click **Actions - Import** in the Manage Value Sets page.
   b. In the File Name field, enter the name of the flat file you uploaded using the Files for Import and Export page.
   c. In the Account field, select the user account containing the flat file.
   d. Click **Upload**.

   Note: Alternatively, you can import the file using either of the following methods:
   - Run the Upload Value Set Values scheduled process.
   - Use the Applications Core Metadata Import web service. For more information on the Applications Core Metadata Import web service, see the SOAP Web Services guide for your cloud services.

Related Topics

- Files for Import and Export: Explained

Requirements for Flat Files to Upload Value Set Values: Explained

You can import large volumes of value set value data from the content repository. To upload value set values to the content repository, create a flat file containing the values in the value set that you want to add or update. You upload these flat files to the content repository using the Files for Import and Export page.

General Requirements

The first line of the flat file must contain the column names for the value set value data, including all mandatory columns, and separated by the '|' (pipe) character. Each subsequent line should contain a row of data specified in the same order as the column names, also separated by the '|' character.

The requirements for creating flat files vary with the type of value sets:

- Independent value sets
- Dependent value sets

Independent Value Set

A flat file for uploading values for independent value sets must contain the following mandatory columns:

Column Name	Data Type
ValueSetCode	VARCHAR2(60)
Value	VARCHAR2(150)
Enabled Flag	VARCHAR2(1), Y or N

Note: You can also specify optional columns.

Examples:

- To upload values to a COLORS independent value set with the minimum columns, you can use the following flat file:

```
ValueSetCode | Value | EnabledFlag
COLORS | Red | Y
COLORS | Orange | Y
COLORS | Yellow | Y
```

- To upload values to a STATES independent value set with more (optional) columns, you can use the following flat file:

```
ValueSetCode | Value | Description | EnabledFlag
STATES | AK | Alaska | Y
STATES | CA | California | Y
STATES | WA | Washington | Y
```

Dependent Value Sets

A flat file for uploading values for dependent value sets must contain the following mandatory columns:

Column Name	Data Type
Value Set Code	VARCHAR2(60)
Independent Value	VARCHAR2(150)
Value	VARCHAR2(150)
Enabled Flag	VARCHAR2(1), Y or N

Note: You can also specify optional columns.

Example:

To upload values to a CITIES dependent value set (dependent on the STATES independent value set), you can use the following flat file:

```
ValueSetCode | IndependentValue | Value | EnabledFlag
CITIES | AK | Juneau | Y
CITIES | AK | Anchorage | Y
CITIES | CA | San Francisco | Y
CITIES | CA | Sacramento | Y
CITIES | CA | Los Angeles | Y
CITIES | CA | Oakland | Y
```

Additional Optional Columns

In addition to the mandatory columns, you can add the following optional columns for both dependent and independent value sets:

Column Name	Type
Translated Value	VARCHAR2(150), for use in value sets that are translatable
Description	VARCHAR2(240)
Start Date Active	DATE, formatted as YYYY-MM-DD
End Date Active	DATE, formatted as YYYY-MM-DD
Sort Order	NUMBER(18)
Summary Flag	VARCHAR2(30)
Flex Value Attribute1 ... Flex Value Attribute20	VARCHAR2(30)
Custom Value Attribute1 ... Custom Value Attribute10	VARCHAR2(30)

Related Topics

- Files for Import and Export: Explained

Upload Value Set Values Process

This process uploads a flat file containing value set values for flexfields. You can use this scheduled process to upload a file containing values you want to edit or add to an existing independent or dependent value set. This process is useful for adding or updating large volumes of value set value data in an automated or recurring fashion. For example, you can upload a hundred values on a recurring basis when scheduled as a recurring process. This method may be more efficient than using the one-time Import action in the Manage Value Sets tasks in the Setup and Maintenance work area. However, for an ad hoc task of uploading a hundred values, it may be quicker to use the Import action in the relevant tasks.

Run this process from the Scheduled Processes Overview page. You can run it on a recurring basis whenever the flat file in the content repository account is updated.

You must create the flat file containing the values data, and upload the flat file to the content repository using the Files for Import and Export page.

Parameters

Flat File Name

Enter the name of the flat file you uploaded using the Files for Import and Export page.

Account

Select the user account containing the flat file in the content repository to upload.

Related Topics

- Files for Import and Export: Explained
- Scheduled Processes: Explained

Translating Flexfield and Value Set Configurations: Explained

When you first configure a flexfield or segment, the translatable text that you enter, such as prompts and descriptions, is stored as the text for all installed locales. You may then provide a translation for a particular locale. If you don't provide a translation for a given locale, then the value that was first entered is used for that locale.

To translate the text for a particular locale, log in with that locale or specify the locale by selecting **Settings and Actions - Personalization - Set Preferences** in the global area. Then, update the translatable text in the flexfield using the Manage Descriptive Flexfields task, Manage Key Flexfields task, or Manage Extensible Flexfields task. Your modifications change the translated values only for the current session's locale.

After you complete the translations, deploy the flexfield.

You can define translations for a dependent value set or an independent value set, if it is of type Character with a subtype of Translated text. You define the translations by setting the current session to the locale for which you want to define the translation and using the Manage Value Sets task to enter the translated values and descriptions for that locale.

For a table value set for which the underlying table supports multiple languages and for which the value set's value column is based on a translated attribute of the underlying table, you can define translated values using the maintenance task for the underlying table. For more information on using multilanguage support features, see the Oracle Fusion Applications Developer's Guide.

FAQs for Manage Applications Core Value Sets

What happens if a value set is security enabled?

Value set security is a feature that enables you to secure access to value set values based on the end user's role in the system.

As an example, suppose you have a value set of US state names. When this value set is used to validate a flexfield segment, and users can select a value for the segment, you can use value set security to restrict them to selecting only a certain state or subset of states based on their assigned roles in the system.

For example, Western-region employees may choose only California, Nevada, Oregon, and so on as valid values. They cannot select non-Western-region states. Eastern-region employees may choose only New York, New Jersey, Virginia, and so on as valid values, but cannot select non-Eastern-region states. Value set security is implemented using Oracle Fusion Applications data security.

How can I set a default value for a flexfield segment?

When you define or edit a flexfield segment, you specify a default value from the values provided by the value set assigned to that segment.

You can set the default value for a descriptive flexfield segment to be a parameter, which means the entity object attribute to which the chosen parameter is mapped provides the initial default value for the segment.

You can set the default value to be a constant, if appropriate to the data type of the value set assigned to the segment.

In addition to an initial default value, you can set a derivation value for updating the attribute's value every time the parameter value changes. The parameter you choose identifies the entity object source attribute. Any changes in the value of the source attribute during run time are reflected in the value of the segment.

If the display type of the segment is a check box, you can set whether the default value of the segment is checked or unchecked.

Related Topics

- Defaulting and Deriving Segment Values: Explained

Manage Applications Core Attachment Entities

Attachments: Explained

You can use attachments to provide supplementary information to specific business objects. Attachments can be URLs, desktop files, text, or repository folders. For a business object you may view, create, delete, or edit attachments, depending on your role and granted privileges. For more information on attachments, see the Oracle Fusion Applications Developer's Guide.

Repository

Attachments are stored in a content management repository provided by Oracle WebCenter Content Server. Users managing attachments can't interact with the repository unless the repository mode is enabled. When enabled, users can share attachments among objects, update attachments, and perform other tasks. Access to the attachment files is controlled by a digital signing mechanism.

Security

Data security applicable to a specific business object extends to its attachments For example, if a user has no access to a specific expense report, then that user cannot access its attachments. You can also use attachment categories to control access and actions on attachments, based on roles associated with that category. For more information on securing attachments, see the Oracle Fusion Applications Developer's Guide.

Attachment Entities: Explained

An attachment entity is usually a database entity, for example a table or view, that represents a business object with which attachments can be associated. Each attachment UI must be defined with a corresponding attachment entity. Attachment entities are used only in the context of attachments and exist separately from the database entities that they are based on.

In the Setup and Maintenance work area, search for the Manage Attachment Entities task. Use the Manage Attachment Entities page to edit and create attachment entities. You can either use the predefined attachment entities with attachment UIs or create entities, for example when developing custom UIs.

The entity name should match the name of the table or view that represents the business object used for attachment. The name is also used in the repository folder that is automatically created to store attachments for the entity.

The data security policies associated with the database resource defined for the attachment entity apply to attachments for that entity. However, the security setting must be enabled for that entity. The database resource value must match the value in the OBJ_NAME column in the FND_OBJECTS table for the business object that the entity represents.

Related Topics

- Database Resources and Data Security Policies: How They Work Together

Attachment Entities and Attachment Categories: How They Work Together

The association between attachment entities and categories determines the use of categories for an entity. For example, categories associated with the expense report attachment entity are available in the attachment UIs for expense reports. You can configure the associations when managing either entities or categories. Between the Manage Attachment Entities and Manage Attachment Categories pages, any change in association on one page automatically reflects on the other page. You can open either page by starting in the Setup and Maintenance work area and searching for the attachment tasks.

Managing Entities

On the Manage Attachment Entities page, you determine which attachment categories are relevant to a particular entity. Each entity must have at least one category. For a particular expense report page with attachments functionality, you can specify which category to use for the attachment. Accordingly, the data security defined for each category is applied to the attachments on that page if security is enabled.

Managing Categories

If you create an attachment category and must assign it to multiple attachment entities, use the Manage Attachment Categories page. The association is the same as that on the Manage Attachment Entities page.

Attachments Troubleshooting: Explained

Attachments UIs are very user-friendly and easy to work with. You may encounter issues in certain cases such as you customize the attachments, for example create additional attachment categories, or implement data security on them.

Issue: Can't View, Add, Update, or Delete Attachments

You may encounter the following issues when trying to view attachments or perform actions such as adding attachments.

- You can no longer see specific attachments that were earlier visible.
- You can no longer update or delete attachments.
- You get an error stating that you do not have permission to add attachments.

Resolution

Use the Manage Attachment Entities page to ensure that attachment categories are associated to the relevant attachment entity. You might need to check with your system administrator or help desk to determine the exact entity used on the page with the expenses attachments or what categories to assign.

If data security is implemented on the categories for the attachment entity, verify that the Enable Security check box is selected in the Manage Attachment Entities page for that entity. Make sure that users have a role with the privileges shown in the following table, to view, add, update, or delete attachments with a specific attachment category.

Action	Privilege
View	Read Application Attachment (FND_ READ_ APPLICATION_ ATTACHMENT_ DATA)
Add or Update	Update Application Attachment (FND_ UPDATE_ APPLICATION_ ATTACHMENT_ DATA)
Delete	Delete Application Attachment (FND_ DELETE_ APPLICATION_ ATTACHMENT_ DATA)

For example, if users have the Read Application Attachment privilege for all categories associated with the expense report attachment entity, except the Receipts attachment category, then they can view all expense report attachments except those created with the Receipts category. Likewise, if users do not have the Update Application Attachment privilege for any attachment categories tied to the expense report attachment entity, then they cannot create any attachments for the expense reports.

For more information on attachment category data security, see the Oracle Fusion Applications Developer's Guide.

Certain attachments UI have predefined restrictions for users on categories. Your developers can also introduce additional filters to determine which document categories are available for a specific page. Check with your developers or help desk.

Issue: Missing Attachment Category

You can view existing attachments but the attachments no longer have an attachment category associated with them.

Resolution

When the attachment was added, at least one category existed for the corresponding attachment entity. Since then, the entity was edited so that it no longer has any assigned categories, so the user cannot see the category associated with that attachment.

Use the Manage Attachment Entities page to reassign attachment categories to the relevant attachment entity. For example, if users can no longer see the Receipts attachment category for an attachment to an expense report, then search for the expense report attachment entity and assign to it the Receipts category. You may need to check with your system administrator or help desk to determine the exact entity used on the page with the expenses attachments or any additional categories to assign.

Certain attachments UI have predefined restrictions for users on categories. Your developers can also introduce additional filters to determine which document categories are available for a specific page. Check with your developers or help desk.

FAQs for Applications Core Common Reference Objects: Manage Applications Core Attachment Categories

What's an attachment category?

You must use an attachment category to classify and secure an attachment. While adding attachments, you can view the available attachment categories and add the attachment to one of them. For example, attachments for an expense report can be categorized as receipts, scanned invoice images, and so on.

You can also associate roles with categories to restrict user access and actions for an attachment entity. You can also create and manage custom categories for your own purpose, involving specific attachments with specific security requirements. For more information on attachment category data security, see the Oracle Fusion Applications Developer's Guide.

In the Setup and Maintenance work area, search for the Manage Attachment Categories task and access the Manage Attachment Categories page.

Define Global Search

Setting Up the Global Search: Overview

You have many options for setting up the global search, from enabling or disabling it completely to controlling what appears in the autosuggest. For most of the steps, use setup tasks in the Setup and Maintenance work area.

Enabling Global Search

A predefined set of business objects, for example help files in Applications Help, are available for global search. These objects are grouped into categories. The search gives you results from indexed data, for example the help files with text that matches your search term.

Enabling global search includes setting up the predefined objects and categories, and starting a schedule to refresh the index so that users get the latest results.

1. Check with your help desk to make sure that objects, categories, and schedules are already set up.

   If you're not using an Oracle Cloud implementation, you need to do this setup yourself. For details about enabling search for predefined objects, categories, and indexes, see the Oracle Fusion Applications Administrator's Guide.
2. Set the Global Search Enabled (FUSION_APPS_SEARCH_ENABLED) profile option to **Yes** at the Site level.

   - Otherwise, the search field isn't available in the global area for any user.
   - After you set the profile option, users must sign out and sign back in to see the global search.

Note: Enabling global search is the only mandatory setup. You can skip the rest of the steps below, and just use the default configuration for the global search.

Defining Global Search

Use these tasks in the following tasks lists to control how the global search works:

- Define Global Search task list
  - **Manage Global Search Configurations:** Define configurations that capture a collection of settings, and determine which configurations are enabled or used as default. Each configuration applies to the global search on all or specific applications or pages.
  - **Manage Suggestion Groups:** Define suggestion groups, which represent categories of suggestions in the autosuggest.
- Manage Applications Core Common Reference Objects task list
  - **Manage Applications Core Alternate Words:** Define alternates for search terms that users enter, so that the search can also find matches based on the alternate terms.

Retaining Recent Items

You can set the Recent Items Retention (FND_PURGE_RECENT_ITEMS) profile option to determine how long to retain recent items for the global search autosuggest. A page that the user opened can appear in the user's autosuggest until the specified number of days passes. Aside from the autosuggest, this profile option also applies to the recent items tracked under **Favorites and Recent Items** in the global area.

Related Topics

- Setting Profile Option Values: Procedure

Manage Global Search Configurations

Setting Global Search Configurations as Enabled or Default: Examples

Each global search configuration contains settings for the global search, and a configuration can apply to specific pages or applications. Use the Manage Global Search Configurations page to enable or disable configurations, and select the one to use as the default. The following scenarios explain which configurations actually apply to the global search, depending on the configurations that you enable or set as default.

Predefined Default

The predefined Default configuration is always enabled and set as a default. This configuration is the working default unless a custom global search configuration is also set as a default. In this scenario, you don't enable any other configuration, so this Default configuration applies to the global search on all pages, in all applications.

Custom Default

You create a custom global search configuration that applies to page A and application B. Later, you set your configuration as the default. Only this custom configuration and the predefined Default configuration are enabled. Both are set as default.

The result is that:

- Your custom configuration overrides the predefined Default one and becomes the working default.
- Even though you defined your custom configuration to apply to page A and application B, it now actually applies to all pages and all applications. This is because your configuration is the working default, and no other configuration is enabled.

Specific Pages or Applications

You're using either the predefined Default configuration or a custom configuration as the default. You also enable:

- **Configuration 1:** Applies to application A
- **Configuration 2:** Applies to application B and a few pages in application A

The result is that:

- Configuration 1 applies to all pages in application A, except the few pages that use configuration 2.
- Configuration 2 applies to all pages in application B, plus the few pages in application A.
- The default configuration applies to all other applications and pages.

Creating Global Search Configurations: Procedure

Predefined global search configurations control how the global search behaves and looks. You can't edit these configurations, but you can duplicate them and edit the copies, or create your own from scratch.

Creating a Configuration

Follow these steps:

1. Open the Setup and Maintenance work area, and go to the Manage Global Search Configurations task.
2. Click **Create**, or select a row and click **Duplicate**.

   Note: You can't delete a configuration after you create it, but you can disable it.
3. For the short name (identifier for your configuration), enter an alphanumeric code with uppercase letters and no spaces.
4. Enter a user-friendly name and description for the configuration.
5. Select the **Default** check box if you want to use your configuration as the default instead of the predefined Default configuration. If another custom configuration was already set as the default, then your configuration becomes the new custom default.
6. Select a product family if the configuration is for applications or pages within a specific family. Otherwise, select **Common**.
7. If you're creating a duplicate, click **Save and Close**. To go on to the next steps and define more settings, select your configuration and click **Edit**.
8. Enter a module within the product family you selected. If you selected the Common family, then select the **Oracle Middleware Extensions for Applications** module.
9. Use the tabs to define your configuration:
   - **Autosuggest:** Determine what's available to users in the global search autosuggest, as well as how the autosuggest looks and behaves.
   - **Search Field:** Control the search field in the global area and in the search results dialog box.
   - **Search Results:** Enable or disable saved and recent searches, select the search categories available to users, and define settings for filters.
   - **Pages:** Indicate the applications or pages that this global search configuration applies to.
10. Save your work.

Setting Up the Autosuggest for the Global Search: Procedure

Use global search configurations to determine what's available to users in the autosuggest. You select the suggestion groups to include in configurations. The configurations also determine how the autosuggest looks and behaves.

Prerequisite

Open the Autosuggest tab in the Create or Edit Global Search Configuration page.

Defining the Content

To select suggestion groups and determine how they're displayed in the autosuggest:

1. In the Suggestion Group section on the Autosuggest tab, move the groups you want to include into the **Selected Groups** pane.

   The **Enabled** column in the Available Groups pane indicates if the group is defined (on the Manage Suggestion Groups page) to be displayed by default or not in the autosuggest.
2. In the **Enabled** column in the Selected Groups pane, select one of the following values. The **Displayed by Default** column shows the resulting behavior in the autosuggest, based on what you select in the **Enabled** column.

   Note:

   - **Inherit:** In the autosuggest, the group is displayed or hidden by default depending on what's defined for the group.
   - **Yes:** The group is displayed by default, no matter what's defined for the group.
   - **No:** The group is hidden by default, no matter what's defined for the group.
3. Order the selected groups as you want them to appear in the autosuggest.
4. Above the Suggestion Groups section, select the **Enable personalization of search groups** check box if you want to allow users to override your configuration. Users can hide, show, and reorder suggestion groups for their autosuggest.

Tip: Click the **Manage Suggestion Groups** button at any time to edit or create suggestion groups. When you return to the Autosuggest tab, click **Refresh** to reflect the changes you made to suggestion groups.

Defining the Appearance

Optionally define settings in the Appearance section on the Autosuggest tab:

- **Show Suggestion Group Headings:** Select this option to display suggestion group headings (text and icon) in the autosuggest. Even if you do so, if a group is defined on the Manage Suggestion Groups page to not show headings, then its heading won't be displayed.
- **Show Icons:** Select this option to display icons next to suggestions in the autosuggest.
- **No Suggestions Message:** Enter the message that appears when no suggestions match the user's search term. If you leave this field blank, then no autosuggest or anything at all appears when there are no matches.

Defining the Behavior

Optionally define settings in the Behavior section on the Autosuggest tab:

- **Show Top Suggestions:** Enable this option to display suggestions in the autosuggest as soon as the user clicks in the search field, even without entering a search term. For example, the last few pages the user opened would appear as suggestions under the Recent Items group.
- **Minimum Characters for Autosuggest:** Enter the number of characters that users must enter in the search field before matching suggestions appear in the autosuggest.
- **Maximum Number of Suggestions:** Enter the maximum number of suggestions to be displayed across all suggestion groups. This total is distributed as equally as possible among the groups.

Disabling Saved Searches and Recent Searches for the Global Search: Points to Consider

Global search configurations determine if saved searches and recent searches are enabled in the global search. Consider the following points when you use disable either. In the Create or Edit Global Search Configuration page, open the Search Results tab and use the Saved and Recent Searches section.

Disabling Saved Searches

If you disable saved searches:

- You disable the Save button in the search results dialog box, so users can't create or edit saved searches for global search.
- You're not disabling the Saved Searches suggestion group. Users can still see any applicable saved searches in the global search autosuggest.

Disabling Recent Searches

If you disable recent searches:

- The application isn't saving recent searches.
- You're not disabling the Recent Searches suggestion group. Users can still see in the autosuggest any applicable searches that they recently ran before you disabled recent searches.

Setting Up Filters for the Global Search: Procedure

To determine how users can filter their search results, define the appropriate settings when you create or edit global search configurations. You can set up search categories so that users can limit the scope of their search to begin with, or refine their search results.

Prerequisite

Open the Search Results tab on the Create or Edit Global Search Configuration page.

Setting Up Categories to Narrow Search Scope

To let users select the categories to search on before running the search:

1. In the Filters section, enable personalization of search categories.
2. In the Search Categories section, select the categories that users can search on. If you don't select any, then every category is available to users.

Setting Up Categories as Search Result Filters

To let users filter search results based on category:

1. In the Filters section, select the check boxes to show subcategories, facets, or both. Categories are always displayed. Subcategories are an additional level of filters below categories, and facets are a level below categories.
2. Select a filter display style so that the list of all available category names are displayed:
    - **Inline:** In the Filters pane in the search results
    - **LOV:** In a Categories dialog box that users can open from the Filters pane
3. In the Search Categories section, select the categories to use as filters. This is the same set of categories to be used for personalization. If you don't select any, then every category is available to users.

Setting Other Options for Filters

You can also use the Filters section to:

- **Show Hit Counts:** Show the number of search results that match each filter value
- **Enable Clear All Filters:** Allow users to clear all filters with one click of a button

In the Last Updated Date Filters section, select the criteria to use as filters, based on the last update date. If you don't select any, then every date filter is available to users.

Specifying the Pages or Applications That a Global Search Configuration Applies To: Procedure

As part of defining your global search configuration, you can specify the pages or applications (or both) that your configuration applies to. If you want your configuration to apply to all pages in all applications, then skip these steps.

Prerequisites

If you want the global search configuration to apply to specific applications, you need to find the application short name.

1. Open the Setup and Maintenance work area and go to the Manage Taxonomy Hierarchy task.
2. Expand the Oracle Fusion node.
3. Select the row (with the Application module type) for your application, and click **Edit Module**.
4. In the Application Details section, see the **Application Short Name** column and note down the value to use as the application short name.

Adding Pages or Applications

Follow these steps:

1. On the Create or Edit Global Search Configurations page, open the Pages tab.
2. Click the **Create** icon.
3. In the **View Type** column, indicate if the configuration applies to a specific page or application.
4. Enter a view ID to identify the page or application:

   Tip: You can use **%** as a wildcard for the page or application value, such as **Example%** for all pages that start with **Example**.

   - **Page:** Enter the last part of the URL you get when you open that page. For example, enter `ExamplePage` from the URL `http://exampleServer/homePage/faces/ExamplePage`.
   - **Application:** Enter the application short name with a wildcard at the end, for example `HomePageApp%`.
5. Add more pages or applications as needed.

Manage Global Search Suggestion Groups

Suggestion Groups for the Global Search: Explained

A suggestion group is a category of suggestions that users see in the autosuggest for the global search. For example, if the user enters Report in the search field, then the Navigator suggestion group in the autosuggest shows any Navigator menu names with Report.

Managing Suggestion Groups

Each suggestion group can have a heading, for example Recent Items, as well as an icon that appears before the heading text. The icon helps users identify what the group is all about.

You can manage suggestion groups to:

- Show or hide the group by default in the autosuggest
- Enter the heading text
- Define if the heading text appears in the autosuggest or not
- Identify the image file to use as the icon

Tip: You can copy predefined suggestion groups and edit them to create customized versions.

To manage suggestion groups, open the Setup and Maintenance work area and use either the:

- Manage Suggestion Groups task
- Autosuggest tab when you create or edit global search configurations using the Manage Global Search Configurations task

Using in Global Search Configurations

Just because a suggestion group is defined to be displayed by default doesn't necessarily mean that it in fact appears in the autosuggest. Global search configurations determine which groups are included for the autosuggest, whether icons appear for the headings, and so on.

You can use a suggestion group in many or all global search configurations. And ultimately, if personalizing suggestion groups is enabled, then users can show, hide, and reorder the suggestion groups included in the global search configuration.

Changing the Heading Text and Icon for Suggestion Groups: Worked Example

This example shows how to change the icon and text for a suggestion group heading in the global search autosuggest. In this example, you start out with the predefined Default global search configuration enabled, and no custom configurations.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
Which predefined suggestion group do you want to change?	Recent Items
What do you want the new heading text to be?	Recently Visited Pages
Which image do you want to use as the icon?	A .png file (16 by 16 pixels) that's used on your company Web site
Do you want the new suggestion group to appear in the autosuggest by default?	Yes
Which pages should the changes apply to?	All pages

To use a new icon and heading text for the suggestion group:

- Make a copy of the predefined Recent Items suggestion group.

- Update global search configurations to use the custom suggestion group.

Duplicating the Predefined Suggestion Group

1. Open the Setup and Maintenance work area, and go to the Manage Suggestion Groups task.
2. Select the Recent Items group and click **Duplicate**.
3. In the new row, enter **RECENTCUSTOM** as the short name.
4. Change the display name to **Custom Recent Items**.
5. Change the description to **Custom version of Recent Items**.
6. With your new row still selected, click **Edit**.
7. In the Heading section, enter **Recently Visited Pages** in the **Text** field.
8. In the **Icon** field, enter the full URL to your .png file.
9. Click **Save and Close**.

Updating Global Search Configurations

1. In the Setup and Maintenance work area, go to the Manage Global Search Configurations task.
2. Select the Default configuration and click **Duplicate**.
3. Fill out the row for your new configuration, selecting the **Default** check box.
4. With the row still selected, click the **Edit** icon.
5. In the Autosuggest tab, click the **Refresh** button in the Suggestion Group section if you don't see your custom suggestion group.
6. Move the Custom Recent Items group into the **Selected Groups** list, and move the Recent Items group out.
7. In the **Enabled** column for the Custom Recent Items Group, select **Yes**.
8. In the Appearance section, make sure that headings are set to be displayed.
9. Click **Save and Close**.

Creating Suggestion Groups for the Global Search: Procedure

For the autosuggest in the global search, you can create new suggestion groups that determine suggestions in a way that's different from the predefined groups. Creating such suggestion groups involves developer tasks and is not applicable to Oracle Cloud implementations. After the code for the group is ready, you define the new suggestion group in the Create Suggestion Group page.

Note: You can't delete a suggestion group after you create it.

Prerequisites

Before you define the new suggestion group:

- Your developer writes code for the new suggestion group and provides you values for some of the suggestion group settings. For more information on implementing autosuggest, see the Oracle Fusion Applications Developer's Guide.
- If you want to display an icon for the group in the autosuggest, make sure that the graphics file:
    - Can be accessed using a URL.
    - Is 16 by 16 pixels or smaller.

Creating Suggestion Groups

Follow these steps:

1. Open the Setup and Maintenance work area and open the Manage Suggestion Groups task.
2. Click **Create**.

3. For the short name (identifier for your group), enter a unique alphanumeric code with uppercase letters and no spaces.
4. Enter a display name for the group, which can be different from the heading that appears in autosuggest.
5. Enter a description.
6. Determine if the suggestion group should be displayed by default in the autosuggest.
7. Select a product family if the group is for business objects from a specific family. Otherwise, use **Common**.
8. Select a module within the product family. If the product family is Common, then use the Oracle Middleware Extensions for Applications module.
9. In the **Data Source** field, enter the value your developer provides to determine the records to display in this suggestion group.
10. In the **Context Code** and **Object Type** fields, enter the value your developer provides, if any.
11. In the Heading section, determine if the heading (text and icon) is visible in the autosuggest.
12. Enter the exact text to appear as the heading of this group in the autosuggest.
13. To display an icon, enter in the **Icon** field the full URL to the image file, or a relative URL that your developer provides if the file is stored with other application artifacts.
14. Save your changes.

Note: Global search configurations:

- Determine which suggestion groups are actually available for the global search.
- Determine whether each included group is visible by default or not in the autosuggest.
- Can hide suggestion group headings in the autosuggest, even if the group is defined to show headings.

Managing Alternate Words for Global Search: Points to Consider

Use the Manage Applications Core Alternate Words task in the Setup and Maintenance work area to maintain a list of search terms that users might use for the global search. For each user keyword, define a possible alternate to also search on. Consider various reasons for defining these word pairs, and also decide whether to automatically search on both terms or not.

Reasons for Word Pairs

This table provides some reasons and examples for managing alternate words.

Purpose	What You Enter	User Input Keyword Example	Alternate Keyword Example
Correct user typos	A possible typo as the user input keyword, and the correctly spelled term as the alternate keyword	Oracel	Oracle
Account for abbreviations and acronyms	An abbreviation or acronym and what it stands for	BI	business intelligence
Account for common variations in spelling	Two different ways to spell the same term	email	e-mail
Enable matches on synonyms	A pair of terms that are functionally similar	hyperlink	link
Help new users who are not familiar with what things are called in the application	The term that your users might search on as the user input keyword, and the equivalent in	concurrent program	scheduled process

Purpose	What You Enter	User Input Keyword Example	Alternate Keyword Example
	the application as the alternate keyword		

Note: You don't have to account for plurals or case sensitivity. For example, if you have **email** as a user input word, you don't have to also add **Email** or **emails** as an input word.

Automatically Search Both Terms

For each pair of terms, use the Automatically Search Both check box to determine what happens when the user enters the input word and starts the search:

- **Yes:** The search runs and displays results based on both terms.

  Before you select this check box, carefully consider possible impact. For example, would users get a lot of unnecessary search results, making it harder to find what they want?

- **No:** The user sees a message and can decide to continue searching on just the input term, or to search on just the alternate term instead.

13 Define Custom Enterprise Scheduler Jobs

How can I see which applications a Manage Custom Enterprise Scheduler Jobs task includes?

In the Setup and Maintenance work area, see the task's description in the help window for the task, if any. To open the help window, click the help icon next to the task name, on pages such as the Manage Task Lists and Tasks page.

Tip:

- Click **Show Help** in the global area if you don't see help icons at all on the page.
- Make sure to show the Help column in the table.

You can also:

1. Open the work area landing page, the Offerings page.
2. Select an offering that contains the specific Manage Custom Enterprise Scheduler Jobs task.
3. Open the Setup Task Lists and Tasks file for the offering, in PDF, HTML, or Excel.

Managing Job Definitions: Highlights

Users run scheduled processes based on Oracle Enterprise Scheduler jobs to process data and, in some cases, to provide report output. A job definition contains the metadata that determines what the job does and what options are available to users. You can create and edit job definitions in the Setup and Maintenance work area, using the Manage Custom Enterprise Scheduler Jobs task for your application.

Viewing Job Definitions

- Use the Manage Job Definitions tab to access predefined and custom job definitions.
- The Name column shows an asterisk for predefined job definitions.

Creating Job Definitions

- You or a technical administrator can create jobs based on Oracle Business Intelligence Publisher reports, Java, PL/SQL, or any other supported technology.
- Every predefined or custom job must have a job definition.
- For Oracle Cloud implementations, you can create custom job definitions only for custom jobs based on reports.
- The Enable submission from Enterprise Manager check box is not applicable to Oracle Cloud implementations.
    - If you don't select this check box, then the job can't be run from Enterprise Manager.
    - If you select this check box, then you can define parameters for your job definition only in Enterprise Manager. Save the rest of your work on the job definition, and then go to Enterprise Manager if you need to define parameters.

Editing Job Definitions

- You can edit all aspects of custom job definitions.
- For predefined job definitions, you can:
    - Determine if user properties are read-only or not.
    - Edit what are described as job properties in the Oracle Fusion Applications Extensibility Guide for Developers.

      See: Customizing Existing Oracle Enterprise Scheduler Job Properties

Managing List of Values Sources: Highlights

A list of values source for Oracle Enterprise Scheduler job definitions determines where a list of values comes from and what the specific values are. Use these lists for parameters and application defined properties, for example a list of countries that users can choose from for a Country parameter.

Note: Since you can't edit parameters for predefined job definitions, list of values sources are only for parameters in custom job definitions.

Accessing List of Values Sources

- Access list of values sources in the Setup and Maintenance work area, using the Manage Custom Enterprise Scheduler Jobs task for your application.
- Open the Manage List of Values Sources tab.

Creating and Editing List of Values Sources

- Search for list of values sources to edit or delete, or to make sure a particular source doesn't already exist before you create it.
- Create list of values sources to register them for use in job definitions.

Managing Job Sets: Highlights

A job set identifies the Oracle Enterprise Scheduler jobs to include in a single process set that users can submit instead of running the jobs separately. The job set definition also determines if the jobs run in serial or parallel, or based on other predetermined logic.

Job Set Content

- A job set can contain any number of individual jobs as well as other job sets.
- There can also be multiple levels of nested job sets within a single job set. For example, a job set can include three jobs and two job sets, one of which contains another job set.

Creating and Editing Job Sets

- Access job set definitions in the Setup and Maintenance work area, using the Manage Custom Enterprise Scheduler Jobs task for your application.
- Open the Manage Job Sets tab.

14 Other Common Setup and Maintenance Tasks

Home Page Setup

Defining Settings for Home and Navigation: Explained

Click **Set System Options** on the Structure page to define settings for the home page and springboard. To open the Structure page, from the Navigator menu, select **Tools - Structure**.

Note: You must be in an active sandbox to define these settings.

Defining Settings

You can define the following settings:

- **Home Panel**: Specify the content of the side panel that appears to the left of the springboard on the home page. Select to display either social networking content or announcements in the panel. By default, social networking content is displayed in the home panel. Also, this panel isn't visible to partners or other external users who sign in to your application, by default. To provide access to such users, contact your security administrator.
- **Enable Infolets**: Select the infolet pages that you want to include on the home page. Based on your selection, these infolet pages will appear as a row of dots on the home page. Users can click a dot to navigate to each included infolet page. If you don't select any infolet page in the settings, no such dots will appear on the home page.

You can use profile options to define settings for the springboard strip that you can find above all simplified pages:

- To enable users to use the springboard strip, set the Springboard Strip Enabled profile option (FND_USE_FILMSTRIP) to Yes.
- If the FND_USE_FILMSTRIP profile option is set to Yes, then you can display the springboard strip as expanded by default. To do so, set the Springboard Strip Expanded profile option (FND_EXPAND_FILMSTRIP) to Yes. A user can still collapse or expand the strip on any page, and once done, this profile option is set by default for subsequent sessions of that user.

Related Topics

- Setting Profile Option Values: Procedure

FAQs for Home Page Setup

How can I post announcements on the home page?

Use the Announcements page to create, edit, and delete announcements. From the Navigator menu, select **Tools - Announcements**.

- Only the announcement's content (not subject) appears on the home page.

- If social networking features appear instead of announcements, then on the Set System Options page, change the home panel settings to display announcements. To open this page from the Navigator menu, select **Tools - Structure**, and then click **Set System Options**.
- What you do on the Announcements page applies immediately to all users, even if you saved your changes while a sandbox is active and not yet published.

Related Topics

- Setting Up Sandboxes: Procedure

How can I enable infolets?

Follow these steps:

1. Select **Tools - Structure** from the Navigator menu.
2. Click **Edit**.
3. On the Sandbox Required dialog box, click **Activate Sandbox**.
4. Select a sandbox and set it as active.
5. On the Structure page, click **Set System Options**.
6. Select **Enable Infolets**.
7. Click **Save and Close**.

Note: To make the settings changes available to users, publish the sandbox.

Contextual Addresses

Setting Up the Mapping Service for Contextual Addresses: Points to Consider

A contextual address is marked with an orange triangle that users can click to display the address on a map. The Mapping Service for Contextual Addresses profile option determines the mapping service to use to display the map. Use the Manage Administrator Profile Values or Manage Application Toolkit Administrator Profile Values task in the Setup and Maintenance work area to set the profile option value.

Profile Option Default

By default, the Mapping Service for Contextual Addresses profile option has no value.

Caution: Until you enter a valid value for this profile option, users get an error when they try to open a map for any contextual address.

Profile Option Value

After you find and select the Mapping Service for Contextual Addresses profile option, enter a mapping service URL in the Profile Value column, for example:

- `http://maps.google.com/maps?output=embed&q=`
- `http://maps.yahoo.com/maps_result.php?q1=`

- `http://maps.live.com/default.aspx?where1=`
- `http://bing.com/maps/?v=2&encType=1&where1=`

You can include parameters in the URL. For example, to avoid a locator box in Google Maps, add `&iwloc=&` to the URL. So, you would enter `http://maps.google.com/maps?iwloc=&&output=embed&q=` as the profile value.

Related Topics

- Setting Profile Option Values: Procedure

Privacy Statement

How can I enable the privacy statement?

In the Setup and Maintenance work area, open the Manage Applications Core Administrator Profile Values task and search for the **Privacy Statement URL** profile option. In the profile values section, update the **Profile Value** text box with the full URL of the web page containing the privacy content.

In the global area, click your user name and from the Settings and Actions menu, select **About This Page.**. Click **Privacy Statement** to view the linked web page.

Setting Up for General Troubleshooting: Points to Consider

To help the help desk troubleshoot issues that users encounter in the application, users can record the issue while they reproduce it. Some advanced users might also need detailed information in the About This Page dialog box. Setting up for troubleshooting involves making sure that users have the right access, and determining how many users can record at the same time.

Access

Check with your security administrator that the appropriate users are assigned roles that inherit the following privileges:

- **Record and View Issue (FND_RECORD_AND_VIEW_ISSUE_PRIV):** To create a basic recording
- **Set Issue Recording Advanced Options (FND_SET_ISSUE_RECORDING_ADVANCED_OPTIONS_PRIV):** To set advanced options before starting the recording
- **View Version Information (FND_VIEW_VERSION_INFORMATION_PRIV):** To see the versions that technical components of the application are on

Number of Users

Recordings are stored on servers, and by default, up to five users can record at the same time on each server. For performance reasons, you can set the Maximum Number of Users Allowed to Record Issues (ORA_FND_RECORD_ISSUE_MAX_USERS) profile option to a number lower than five.

Related Topics

- Recording Issues to Troubleshoot: Procedure

- How can I view the version information of an application?
- Setting Profile Option Values: Procedure

15 External Integration

Web Services

Web Services: Overview

Use web services to integrate web-based applications into your Oracle Applications Cloud. Web services expose business objects and processes to other applications through the use of open standards-based technologies.

The web services support development environments and clients that comply with the following open standards:

- Extensible Markup Language (XML)
- Simple Object Access Protocol (SOAP)
- Business Process Execution Language (BPEL)
- Web Services Description Language (WSDL)
- XML schema definitions (XSD)

Oracle Applications Cloud includes two types of web services:

- Application Development Framework (ADF) services
- Composite services

The following table describes the two types.

Web Service Type	Description
ADF services	ADF services usually represent business objects, such as employees or purchase orders. ADF services typically expose standard operations, such as create, update, and delete. However, for locally-persisted objects, ADF services are not limited to these operations. Examples of ADF services include: • **`Worker.changeHireDate`** - a service that updates the hire date of the worker business object. • **`ProjectTask.createTask`** - a service that adds a task to the project task business object.
Composite services	Composite services usually represent end-to-end business process flows that act on business events produced by the ADF services. Composite services orchestrate multiple object-based services, rules services, and human workflows. Examples of composite services include: • **`ProjectStatusChangeApproval.process`** - a service that accepts the change in project status. • ScheduleOrchestrationOrderFulfillmentLineService.scheduleOrders - a service that schedules resources used to fulfill an order.

For more information about web services, see the SOAP Web Services guide for your cloud services.

Developer Connect

Developer Connect: Overview

The Developer Connect portal provides information about the web services deployed to your Oracle Applications Cloud instance. You can use this information to integrate with or extend Oracle Applications Cloud and develop customized business solutions.

To open the Developer Connect portal, from the **Navigator** menu, select **Tools** - **Developer Connect**. This portal displays dynamic information of the web services, and the customization done to web services to integrate with Oracle Applications Cloud. You can synchronize the Developer Connect portal with your cloud instance to retrieve the latest web service information such as service attributes, operations, business objects, security policies, and WSDL files.

Use the Developer Connect portal to:

- View the summary of the web service information such as the business object that the service defines, life cycle status, and security policy.
- Discover the operations available for the selected web service, and the request and response payloads for each operation.
- View the hierarchy of the service data objects and know information such as the data type and whether it's a required field about custom attributes.
- Review the sample payload XMLs for the operations of the web service. You can add or edit sample payloads, and also delete custom sample payloads.

Web Service Life Cycle: Explained

A web service goes through three phases in a life cycle:

- Active: A service is active when it's delivered the first time, until it's deprecated.
- Deprecated: A service is deprecated when it's superseded by a newer version, or if there is a planned obsolescence in a future release. A service in this state is still supported and becomes obsolete in a later release.

  Note: You must use the active version of the service. If you were previously using a service that has been deprecated, then migrate to the new, active version.

- Obsolete: A service is obsolete when it's no longer shipped or supported.

Managing Web Service Sample Payloads: Worked Example

This example demonstrates how to add and edit a sample payload XML for a web service operation. It also describes how to delete a custom sample payload XML.

Adding a Sample Payload XML

Follow these steps to add a sample payload XML for the `getEntityList` operation of `Help Topic Abstract` Service:

1. From the **Navigator** menu, select **Tools** - **Developer Connect**.
2. On the **Web Service** overview page, search for `Help Topic Abstract` Service, and click the service display name.
3. On the **Summary** page, click the **Sample Payloads** tab, and then click **Add Sample Payload**.
4. Select `getEntityList` operation from the list, and enter a brief description.
5. Enter the payload XML, and click **OK**.

Editing a Sample Payload XML

The Developer Connect portal displays predefined and custom payloads of the web services. You can edit only the custom payloads. Follow these steps to edit a custom sample payload of the `getEntityList` operation of `Help Topic Abstract` Service:

1. On the **Web Service** overview page, select `Help Topic Abstract` Service.
2. On the **Summary** page of the web service, click the **Sample Payloads** tab and select `getEntityList` operation.
3. In the **Edit Sample Payload** dialog box, edit the payload XML and click **OK**.

Deleting a Sample Payload XML

You can delete only custom payloads, and not predefined payloads. Follow these steps to delete a custom sample payload of the `getEntityList` operation of `Help Topic Abstract` Service:

1. On the **Web Service** overview page, select `Help Topic Abstract` Service.
2. On the **Summary** page of the web service, click the **Sample Payloads** tab and select `getEntityList` operation.
3. Click the delete icon for the selected operation and click **OK**.

Importing Value Set Values to Oracle Applications Cloud: Worked Example

This example demonstrates how to use the information in the Developer Connect portal to import value set values to Oracle Applications Cloud.

Suppose a fictional partner application wants to extend it with certain functionality available in another application. Instead of creating the required business objects and attributes in this application, you can import them using a web service. Before you proceed with the import process, enable the access permissions for the web service and review the information in the Developer Connect portal:

- Synchronize the web services information
- Review the web service details
- Update the request payload

Synchronizing Web Services Information

You must synchronize the Developer Connect portal with your Oracle Applications Cloud instance to get the latest web service information. Follow these steps:

1. From the Navigator menu, select **Tools - Developer Connect**.
2. Click **Synchronize**.

> **Note:** The **Last Refreshed** date indicates when the Developer Connect portal was last synchronized with your cloud instance.

Searching And Reviewing Web Service Information

On the Web Services overview page, you can enter Manage File Import and Export in the Find field. You can also use Advanced Search option to find web service names that contain import, and select the relevant service from the search results.

To review the information:

1. On the Web Services overview page, select Manage File Import and Export Service. The Summary panel shows information such as the display name, business object that the service defines, life cycle status, QName, security policy used, and a brief overview of the service.
2. Click the Operations tab to view the operations supported by the web service.

3. Click the `uploadFiletoUCM` operation and review the result parameter in the response payload. This parameter holds the file ID in the WebCenter Content repository from which the value set values are imported.
4. Click the `valueSetValuesDataLoader` operation and review the `fileIdAtRepository` parameter in the request payload. This parameter holds the file ID in the WebCenter Content repository.
5. Click **WSDL File** link of the service to download the web service information.

Updating Request Payload

To add a sample payload to import the value set values:

1. Click the Sample Payloads tab and then click **Add Sample Payload**.
2. Select `uploadFiletoUCM` from the operation name list.
3. Enter a brief description of the payload in the description text box.
4. Add the payload to get the file ID from the WebCenter Content repository:

```
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
 <soap:Body>
 <ns1:uploadFiletoUCM
xmlns:ns1="http://xmlns.oracle.com/oracle/apps/fnd/applcore/webservices/types/"
 ns2="http://xmlns.oracle.com/oracle/apps/fnd/applcore/webservices/"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">

 <ns1:document xsi:type="ns2:DocumentDetails">
 <ns2:fileName>VS123.txt</ns2:fileName>
 <ns2:contentType>plain/text</ns2:contentType> <ns2:content>
VmFsdWVTZXRDb2RlfEluZGVwZW5kZW50VmFsdWV8SW5kZXBlbmRlbnRWYWx1ZU51bWJlcnxJbmRlcGVuZGVudFZhbHVlRGF0ZXxJbmRlcGVuZGVu
 QX R0cmlidXRlNH
 xDdXN0b21WYWx1ZUF0dHJpYnV0ZTV8Q3VzdG9tVmFsdWVBdHRyaWJ1dGU2fEN1c3RvbVZhbHVlQXR0cmlidXRlN3xDdXN0b21WYWx1ZUF0dHJpY
 Hx 8fHx8fHx8fHw K
 UkVMN19CNl9WU19OVU1fSU5EfHx8fHwyMDAwfHx8fHxUZXN0aW5nIGZvciBCdWcgMTczNzU2ODR8WXwyMDExLTEwLTAxfDIwMTItMTAtMzB8Mnx
 8f Hx8fHx8fHx8f H
 x8fHx8fHx8fHx8fHx8fApSRUw3X0I2X1ZTX0RBVEVfSU5EfHx8fHx8fDIwMzAtMDEtMDJ8fHxUZXN0aW5nIGZvciBCdWcgMTczNzU2ODQtMXxZf
 UV fREVQfDIwMzE t
 MDMtMDEgMDE6MDA6MDAuMDB8fHwyMDMxLTAzLTAxIDAxOjAwOjAwLjAwfDIwMzEtMDMtMDEgMDE6MDE6MDAuMDB8fHwyMDMxLTAzLTAxIDAxOjA
 </ns1:content>
 <ns2:documentAccount>fin$/tax$/import$</ns2:documentAccount>
 <ns2:documentTitle>VS</ns2:documentTitle>
 </ns2:document>
 </ns1:uploadFiletoUCM>
 </soap:Body>
</soap:Envelope>
```

5. Click OK.
6. Select `valueSetValuesDataLoader` from the operation name list.
7. Enter a brief description of the payload in the description text box.
8. Add the payload to read the contents from the file and import the value set values:

```
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
 <soap:Body>
 <ns1:valueSetValuesDataLoader
xmlns:ns1="http://xmlns.oracle.com/oracle/apps/fnd/applcore/webservices/types/">
 <ns1:fileIdAtRepository>1234</ns1:fileIdAtRepository>
 </ns1:valueSetValuesDataLoader>
 </soap:Body>
</soap:Envelope>
```

Message Patterns: Explained

All operations exposed on a business object service have both synchronous and asynchronous message patterns defined. For conciseness, the service documentation includes the definition for the synchronous message pattern only. Both synchronous and asynchronous operations have the same functional behavior, and request and response payloads. Custom object services don't have corresponding asynchronous operations.

Naming Conventions and Examples

The naming convention for the asynchronous operation is:

- Operation name: Synchronous operation name appended with **`Async`**
- Callback name: Synchronous operation name appended with **`AsyncResponse`**

Using **`Help Topic Abstract`** Service as an example, if the name of the synchronous operation is **`getEntityList`**, the asynchronous operation name and callback name would be **`getEntityListAsync`** and **`getEntityListAsyncResponse`**.

Cross-Origin Resource Sharing

CORS: Explained

Cross-Origin Resource Sharing (CORS) enables secure cross domain communication from a browser. You can configure CORS headers to enable a client application running in one domain to retrieve resources from another domain, using HTTP requests. By default, browser-based programming languages, such as JavaScript, can access content only from the same domain. CORS provides a mechanism to overcome this limitation and access resources from different domains.

To enable CORS in Oracle Applications Cloud, you must set profile option values for the CORS headers in the Setup and Maintenance work area. This table lists the supported CORS headers.

CORS Header	Purpose
Access-Control-Allow-Origin	Contains a comma-separated list of trusted origins that a client application can access resources from.
Access-Control-Max-Age	Specifies the duration of storing the results of a request in the preflight result cache.
Access-Control-Allow-Methods	Contains a comma-separated list of permitted HTTP methods in a request.
Access-Control-Allow-Headers	Contains a comma-separated list of permitted HTTP headers in a request.
Access-Control-Allow-Credentials	Specifies whether a client application can send user credentials with a request.

Example

A client application retrieves resource X from server A, which runs the application logic. The client application then makes an HTTP request to retrieve resource Y from server B. To allow this cross-server request from the client application, you must configure the **`Access-Control-Allow-Origin`** header in server A. Otherwise, the request fails and displays an error message.

Related Topics

- Managing Profile Option Values for CORS Headers: Points to Consider
- Setting Profile Option Values: Procedure

Managing Profile Option Values for CORS Headers: Points to Consider

You can set profile option values for the CORS headers using the Manage Administrator Profile Values task in the Setup and Maintenance work area.

CORS Headers

This table lists the CORS headers that you can set profile option values for.

CORS Header	Profile Option Name (Profile Option Code)	Profile Option Values
Access-Control-Allow-Origin	Allowed Domains (ORACLE. ADF. VIEW. ALLOWEDORIGINS)	Valid values for allowed origins: • URL of the specific origin, for example, http://www.mydomain.com • Comma-separated list of origins, for example, http://www.mydomain.com, http://adc6160507.us.oracle.com, http://software.dzhuvinov.com • ***** to allow access to resources from all origins • Empty (no value set) to prevent access to resources from any origin **Note:** You must set a value for this header to enable CORS.
Access-Control-Max-Age	CORS: Access-Control-Max-Age (CORS_ ACCESS_ CONTROL_ MAX_AGE)	Default value for caching preflight request is 3600 seconds.
Access-Control-Allow-Methods	CORS: Access-Control-Allow-Methods (CORS_ ACCESS_ CONTROL_ ALLOW_ METHODS)	Default values for allowed methods are **OPTIONS**, **HEAD**, **GET**, **POST**, **PUT**, **PATCH**, **DELETE**.
Access-Control-Allow-Headers	CORS: Access-Control-Allow-Headers (CORS_ ACCESS_ CONTROL_ ALLOW_ HEADERS)	Default values for allowed headers are **Accept**, **Accept-Encoding**, **Cache-Control**, **Content-MD5**, **Content-Type**, **If-Match**, **If-None-Match**,**Origin**, **User-Agent**, **X-HTTP-Method-Override**, **X-Requested-By**. **Note:** You must include `Authorization`, with a comma as the delimiter, to the list of allowed headers. For example: **Accept**, **Accept-Encoding**, **Cache-Control**, **Authorization**
Access-Control-Allow-Credentials	CORS: Access-Control-Allow-Credentials (CORS_ ACCESS_ CONTROL_ ALLOW_ CREDENTIALS)	• **True** to enable sending credentials with the request • **False**, which is the default value, to disable sending credentials with the request

Related Topics

- Setting Profile Option Values: Procedure

Viewing Details About Predefined Scheduled Processes: Procedure

To use web services to run predefined scheduled processes, you need details about the processes. View job definitions that the processes are based on, for example to get information about parameters. You might also need to find security requirements for running the scheduled process.

Job Definitions

A job definition contains the metadata that determines how a scheduled process works and what options are available during submission.

To view job definitions:

1. Go to the Setup and Maintenance work area.
2. Run a search with **Manage Custom Enterprise Scheduler Jobs** as the search term.
3. In the search results, open the Manage Custom Enterprise Scheduler Jobs task for the application that contains the job definition. Tasks with names that end in **and Related Applications** include multiple applications.
4. In the Manage Job Definitions tab, select your job definition and click **Edit**.

   Note: Predefined job definitions are marked with an asterisk.

5. Cancel after you get the information you need.

Security

Privileges provide the access needed to run specific scheduled processes. Privileges are granted to duty roles, which are granted to job roles. To see which job roles inherit the needed privileges, use the Security Console or the security reference manuals for the appropriate product family.

Related Topics

- How can I see which applications a Manage Custom Enterprise Scheduler Jobs task includes?

Files for Import and Export

Files for Import and Export: Explained

You can import data into or export data out of the applications. A repository stores the content and the import and export processes handle the data movement into and out of the repository. Integration specialists stage data for import and export. Application administrators run processes to import data in repositories of content to application transaction tables, or retrieve data exported from applications.

Aspects of managing files for import and export involve the following:

- Using the File Import and Export page

- Interacting with content management
- Uploading to facilitate import
- Downloading to facilitate export
- Determining the file size

The File Import and Export Page

Use the File Import and Export page to upload content to or download content from the document repository of Oracle WebCenter Content. Search criteria on the page are limited to the minimum metadata of content management records needed for file import and export. To open the page, from the **Navigator** menu in the global area, select **Tools - File Import and Export**.

Contact the WebCenter Content Administrator for the following additional requirements:

- Information or assistance regarding general access to content management (including all metadata)
- Creating and managing accounts
- Programmatically uploading and downloading content

Interacting with Content Management

Each user with access to the File Import and Export page is assigned to one or more accounts in Oracle WebCenter Content. Accounts organize and secure access to the content items.

Uploading to Facilitate Import

Uploading a file creates a record in Oracle WebCenter Content. When you upload a file, you must also specify an account to which you upload the file. The account you specify determines which import process picks up that file to import it. You can upload any compatible file format, such as MIME, which the content repository can parse. However, the uploaded format must conform to the requirements of the import process. For example, the comma-separated values (CSV) file for the Load Interface File for Import process.

Downloading to Facilitate Export

Records in the search results table of the File Import and Export page provide download links to the files.

File Size

Upload and download don't apply the following by default:

- Data compression
- File splitting

The `UPLOAD_MAX_DISK_SPACE` parameter in the `web.xml` file determines the maximum allowable file size in content management. The default maximum size is 10240000 (10MB).

Files for Import and Export: Points to Consider

Interaction between the File Import and Export page and Oracle WebCenter Content requires securing content in an account. You can use the predefined accounts that are available in Oracle WebCenter Content.

Areas of file import and export involve the following:

- Defining security

- Searching records
- Accessing content in a new account
- Naming the account
- Deleting files

Defining Security

You require the File Import and Export Management duty role for accessing the File Import and Export page. This duty role is included in the predefined role hierarchy for integration specialist roles and product family administrator roles. Files in Oracle WebCenter Content are associated with an account so that only users having access to that account can work with those files. Account names are unique and each account is treated as discrete by access control. You can only upload and download files to and from content repositories that are linked to the accounts you can access. The underlying integrated content management handles security tasks such as virus scanning.

Searching Records

A record in Oracle WebCenter Content contains the metadata used for accessing the file. When a scheduled process is run on a file, the record for the file is assigned a process ID.

Accessing Content in a New Account

After you create a new account in Oracle WebCenter Content, restart the content server. Otherwise, when you use the File Import and Export page to access content in the new account, you may experience a delay. That's because the policy store is being updated with the new account information.

Naming the Account

If you create custom accounts for importing or exporting data, use the following conventions for naming the account:

- Don't include a forward slash (/) at the beginning or end.
- End the name with a dollar symbol ($) to avoid partial string matching.
- Use ($/) as a separator in the hierarchical structure.

For example: `fin$/journal$/import$` The File Import and Export page transforms account names by removing the $ separators. For example `fin$/journal$/import$` appears as `fin/journal/import`. The Remote Introdoc Client (RIDC) HTTP command-line interface (CLI) transforms the account name you specify without the $ symbol to one that includes the symbol. For example, fin/journal/import becomes `fin$/journal$/import$` in WebCenter Content.

Deleting Files

You can delete one file at a time when you use the File Import and Export page. To delete multiple files simultaneously from the content repository, use the standard service page in Oracle WebCenter Content.

External Data Integration Services for Oracle Cloud

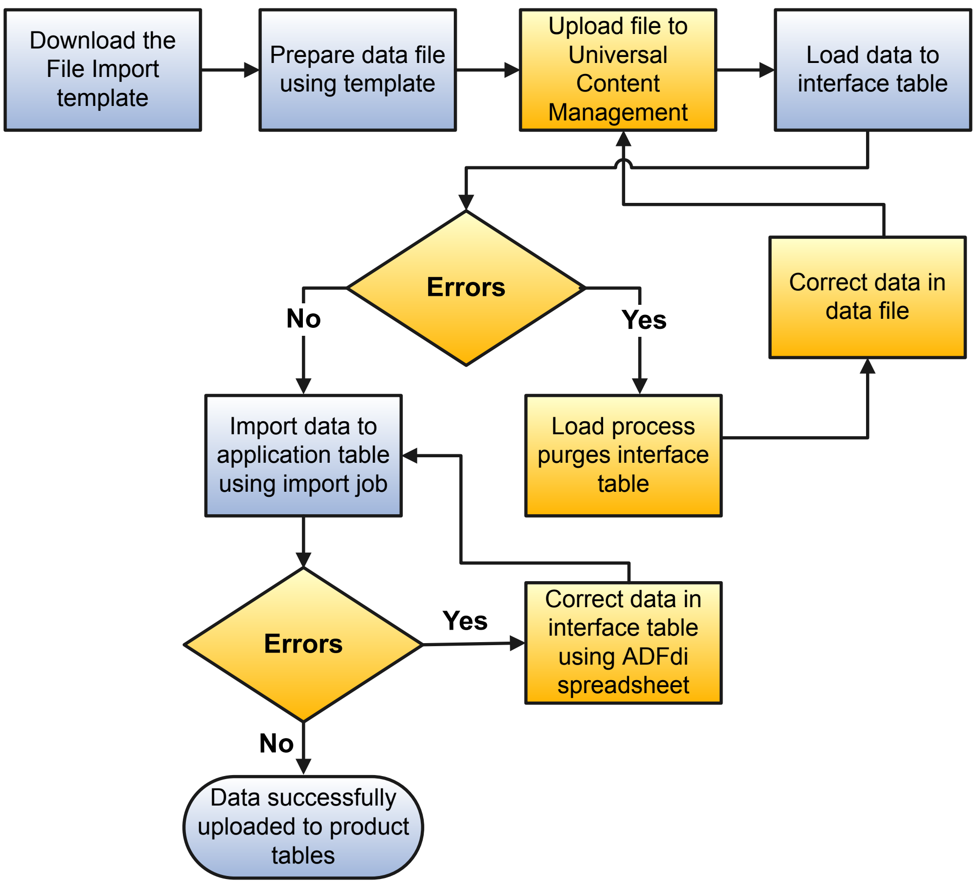
External Data Integration Services for Oracle Cloud: Overview

Use External Data Integration Services for Oracle Cloud to load data into Oracle Fusion Applications from external sources, such as legacy systems and third-party applications.

External Data Integration Services for Oracle Cloud include the following components:

- Templates to structure, format, and generate the data file according to the requirements of the target application tables.
- File-based load process to load the data files into the interface tables.
- Application-specific data import processes to transfer data from interface tables to the application tables in your Oracle Fusion Applications.

The following flow diagram outlines the steps involved in the process:



For further information, see Using External Data Integration Services for Oracle ERP Cloud (2102800.1) on My Oracle Support at https://support.oracle.com.

Related Topics

- Using External Data Integration Services for Oracle ERP Cloud

Locating File Import Templates: Explained

The File Based Data Import guides in the Oracle Help Center (http://docs.oracle.com) include integration templates to help you prepare external data for loading and importing. Each template includes table-specific instructions, guidelines, formatted spreadsheets, and best practices for preparing the data file for upload. Use the templates to ensure that your data conforms to the structure and format of the target application tables.

Preparing external data using templates involve the following tasks:

- Downloading templates
- Preparing data using the XLS template

Downloading Templates

To download the templates:

1. Open the File Based Data Import guide for your cloud service.
2. Locate the import process.
3. View the list of files.
   - Control files describe the logical flow of the data load process.
   - XLSM templates include the worksheets and macros for structuring, formatting, and generating your data file.

     Note: You can use XML templates to import data into Oracle Data Integrator.
4. Click the template link in the File Links table to download the file. For example, click **JournalImportTemplate.xlsm** in the Journal Import topic.

Preparing Data Using the XLS Template

To prepare your data in a spreadsheet format:

1. Open the XLS template. The first worksheet in each file provides instructions for using the template.

   Note: If you don't follow the instructions, you'll get data load errors and data import failures.
2. Save the file.
3. Click the **Generate CSV File** button.

   The macro generates a comma-separated values (CSV) file and compresses the file into a ZIP file. You must transfer the ZIP file to the content management server.

Opening the XML Template

To prepare your data in Oracle Data Integrator, download the XML templates using the following steps:

1. Import the family-level template as a model folder.
2. Import the product-level template as a model folder within the family-level model folder.
3. Import the product template as a model within the product-level model folder.
4. Create the integration project.
5. Create the package.
6. Add and configure these elements:
   - Integration projects
   - Content management document transfer utility
7. Execute the package. The package generates the CSV file and compresses it into a ZIP file.

Using Excel Integration Templates to Generate Data Files: Points to Consider

The File Based Data Import guides in the Oracle Help Center (http://docs.oracle.com) include integration templates to help you prepare external data for loading and importing. Each template includes table-specific instructions, guidelines, formatted spreadsheets, and best practices for preparing the data file for upload. Use the templates to ensure that your data conforms to the structure and format of the target application tables.

Template Structure

The integration templates include the following characteristics:

- Each interface table is represented by a separate worksheet.
- Each interface table field is represented by a worksheet column with a header in the first row.
- Each column header contains bubble text or comments that include details about the column, such as the expected data type, length, and, in some cases, other instructional text.
- Columns are formatted, where applicable, to match the target field data type to eliminate data entry errors.

  The worksheet columns appear in the order that the control file processes the data file.

For more information on the template structure, see the Instructions and CSV Generation worksheet in the template.

Template Requirements

To minimize the risks of an unsuccessful data load, ensure the following:

- Unused columns can be hidden, but not reordered or deleted.

  Caution: Deleting or reordering columns causes the load process to fail and results in an unsuccessful data load.

- External data must conform to the data type accepted by the control file and process for the associated database column.
- Date column values must appear in the YYYY/MM/DD format.
- Amount column values can't have separators other than a period (.) as the decimal separator.
- Negative values must be preceded by the minus (-) sign.
- Column values that require whole numbers include data validation to allow whole numbers only.
- For columns that require internal ID values, refer to the bubble text for additional guidance about finding these values.

After you finish preparing the data in the sheet, click the **Generate CSV File** button to generate a ZIP file containing one or more CSV files.

Using XML Templates to Generate Data Files for Integration: Explained

The File Based Data Import guides in the Oracle Help Center (https://docs.oracle.com) include XML integration templates that you use with Oracle Data Integrator to generate import files from your external data. Oracle Data Integrator provides a solution for integrating complex data from a variety of sources into your Oracle Fusion applications.

To use the XML templates and generate the import files, you must:

- Install and set up Oracle Data Integrator
- Create source and target models
- Create integration projects

Note: For Oracle Cloud implementations, you must upload the ZIP file to the content management repository in Oracle Cloud. For non-Cloud implementations, you can streamline the data integration process by installing the content management document transfer utility, which uses Oracle Data Integrator to transfer the ZIP file.

Using XML Integration Templates to Generate Data Files: Points to Consider

Use XML templates in Oracle Data Integrator to prepare your external data for the load and import process.

The File Based Data Import guides in the Oracle Help Center (https://docs.oracle.com) include three types of XML templates that you import as target models in your Oracle Data Integrator repository:

- Family level
- Product level
- Product

Family-Level XML Files

A family-level XML file is common to a group of product-level model folders and product models.

Consider the following points when you use family-level XML files:

- Use the family-level XML file to support assets in the family, for example, Oracle Fusion Financials or Human Capital Management.
- Import the family-level XML file into your Oracle Data Integrator repository prior to importing the other XML files.
- Import one family-level XML file as a model folder for each family of products.
- Import each family-level XML file as a top-level model folder.
- Import the family-level XML file one time; it supports all subsumed product-level model folders.
- Select Synonym Mode Insert Update as the import type.

Product-Level XML Files

A product-level XML file is common to a group of product models.

Consider the following points when you use product-level XML files:

- Use the product-level XML file to support assets in the product line, for example, Fixed Assets, General Ledger, or Payables.
- Import one product-level XML file as a model folder for each line of products.
- Import the product-level XML file as a model folder into your Oracle Data Integrator repository.
- Import the family-level XML file before you import product XML files.
- Import each product-level XML file as a mid-level model folder within the appropriate family-level model folder.
- Import the product-level XML file one time; it supports all subsumed product models.
- Select Synonym Mode Insert Update as the import type.

Product XML Files

A product XML file represents a specific interface table asset.

Consider the following points when you use product XML files:

- Import one product XML file as a model for each interface table or set of tables, for example, Mass Additions.
- Import the product XML file as a model into your Oracle Data Integrator repository after you import the product-level XML file.
- Import each product XML file as a model within the appropriate product-level model folder.
- Import each product XML file one time. The model is based on File technology.
- Select Synonym Mode Insert Update as the import type.
- After you import the product model, connect the model to the correct logical schema.

Creating Integration Projects That Generate Data Files for Import: Points to Consider

When you use Oracle Data Integrator (ODI) to generate the import data files from external data sources, you must configure an integration project. Integration projects are collections of ODI components that provide the procedural details of an integration from a source to a target. The source is your external data and the target is the import data file that you load and import into your Oracle Fusion Applications.

To create your integration project, you configure the following components:

- Knowledge modules
- Integration interfaces

Knowledge Modules

Knowledge modules contain the information that Oracle Data Integrator requires to perform a specific set of tasks against a specific technology or set of technologies. For example, check knowledge modules ensure that constraints on the sources and targets are not violated, and integration knowledge modules load data to the target tables.

Consider the following points about knowledge modules:

- Knowledge modules that you import into your integration project depend on the source and target technologies, as well as other integration-specific rules and processes.
- Multiple types of knowledge modules exist in ODI.
- Use the SQL File to Append module to create the import data file.

Integration Interfaces

Integration interfaces contain the sets of rules that define the loading of data from one or more sources to the target.

Consider the following points about integration interfaces:

- The source is the data store from your external data model.
- The target is the interface table data store, which is the CSV file from your interface table model.
- After you set up the source and target data stores, map the target fields to the source fields, or map source field values to target fields or constants.

Transferring Data Files to Oracle WebCenter Content Using Manual Flow: Explained

After you generate the ZIP file that contains the CSV data import file, transfer the ZIP file to the content repository.

Use any of the following methods to transfer file:

- File Import and Export page in Oracle Fusion Applications: Manual flow
- Oracle Fusion ERP Integration web service: Automated flow

Aspects of transferring data files to content management involve the following:

- Target accounts
- Accessing transferred content

Predefined Target UCM Accounts

You can transfer data files to predefined accounts in the Universal Content Management server that correspond to the interface table or assets.

To find the UCM account:

1. Open the File Based Data Import guide for your cloud service.
2. Locate your respective import process. For example, **Journal Import**.
3. View the UCM account in the Details section.

For more information, see the following guides in the Oracle Help Center (https://docs.oracle.com):

- SOAP Web Services guide for your cloud services
- File Based Data Import guide for your cloud services

Document Transfer Utility: Explained

The WebCenter Content Document Transfer Utility for Oracle Fusion Applications is a feature-set Java library that provides programmatic access to the content repository. Use the utility to import and export documents, such as import files that contain external data that you want to load into interface and application tables.

The library includes:

- Oracle WebCenter Content client command line tool
- Oracle Data Integrator (ODI) upload and download tools
- Oracle WebCenter Content remote intradoc client (RIDC)
- Oracle HTTPClient
- Oracle Fusion Applications branding and defaults

Options for the WebCenter Content Document Transfer Utility for Oracle Fusion Applications fall into these categories:

- DownloadTool program options
- UploadTool program options
- Debugging and silent invocation options

DownloadTool Program Options

This table describes the download tool program options:

Option	Description
url	Protocol-specific connection URL of content server
username	Username to leverage
password	Password, supplied in command line
passwordFile	Password, supplied in text file on the first line of the file
dID	ID of document revision to download dID is unique across repository dID changes with each revision **Note:** Alternatively, specify the dDocName and RevisionSelectionMethod to identify the dID to leverage.
dDocName	Content name Multiple revisions of a document can share the same dDocName value, otherwise it is unique.

Option	Description
	Note: You should also provide RevisionSelectionMethod value.
RevisionSelectionMethod	Revision to download Valid values: Latest, LatestReleased Default value: Latest
outputFile	Path and name of local file to write

Here you see a sample download invocation command:

```
java -classpath "oracle.ucm.fa_client_11.1.1.jar" oracle.ucm.client.DownloadTool
url=http://ucmserver.com:16200/cs/idcplg username=weblogic password=we1com3i
dID=21537 outputFile="/tmp/output.doc"
```

Here you see sample output:

```
Oracle WebCenter Content Document Transfer Utility
Oracle Fusion Applications
Copyright (c) 2013, Oracle. All rights reserved.
Performing download (GET_FILE) ...
Download successful.
```

UploadTool Program Options

This table describes the upload tool program options:

Option	Description
url	Protocol-specific connection URL of content server
username	Username to leverage
password	Password, supplied in command-line
passwordFile	Password, supplied in text file on the first line of the file
primaryFile	Fully-qualified path of local primary file to upload
dDocAccount	Destination account
dDocTitle	Document title
checkout	If uploading a document revision, check out the document from the repository before uploading the revision Valid values: true, false Default value: false

Option	Description
ignoreCheckoutErrorNeg22	Ignore error -22 (user has already checked-out the document) when checking-out the document. Valid values: true, false Default value: true

Here you see a sample upload invocation command:

```
java -classpath "oracle.ucm.fa_client_11.1.1.jar" oracle.ucm.client.UploadTool
url=http://ucmserver.com:16200/cs/idcplg username=weblogic password=we1com3i
primaryFile="/tmp/resume.doc" dDocTitle="Resume of MSMITH" -dDocAccount=/acme/sales
```

Here you see sample output:

```
Oracle WebCenter Content Document Transfer Utility
Oracle Fusion Applications
Copyright (c) 2013, Oracle. All rights reserved.
Performing upload (CHECKIN_UNIVERSAL) ...
Upload successful.
[dID=21537 | dDocName=UCMFA021487]
```

Debugging and Silent Invocation Options

This table describes the usable options which are common to all tools.

Option	Description
verbose	Verbose output Log filled with Request/ Response DataBinders
quiet	Minimal output
version	Print tool revision or version
log_file_name	Send program output to specified log file instead of the System.out log file
log_ file_append	Append log to existing log file rather than overwrite it Valid values: true, false Default value: false
socketTimeout	Override time out of socket Specify override time in seconds

You can use the tools to test the connection. Provide only the url, username, and password as you see in this sample test:

```
java -classpath "oracle.ucm.fa_client_11.1.1.jar" oracle.ucm.client.DownloadTool
url=http://ucmserver.com:16200/cs/idcplg username=weblogic password=we1com3i
```

Here you see the sample output:

```
Oracle WebCenter Content Document Transfer Utility
Oracle Fusion Applications
Copyright (c) 2013, Oracle. All rights reserved.
Performing connection test (PING_SERVER) ...
Connection test successful.
```

Load Interface File for Import Process

Use to load external setup or transaction data from a data file in the content repository to interface tables. The process prepares the data for import into application tables.

You run this process from the Scheduled Processes page. You can run it on a recurring basis.

Before running this process, you must:

1. Prepare your data file.
2. Transfer the data file to the content repository.

Parameters

Import Process

Select the target import process.

Data file

Enter the relative path and the file name of the *.zip data file in the content repository.

Importing Data into Application Tables: Procedure

The final destination for your external data is the application data tables of your Oracle Fusion application.

Importing data into application tables involves the following:

- Loading data into interface tables
- Finding and submitting the import process

Loading Data into Interface Tables

Interface tables are intermediary tables that store your data temporarily while the application validates format and structure. Run the Load Interface File for Import scheduled process to load data from the data file into the interface table that corresponds to the template that you use to prepare the data.

To load your data into interface tables, submit the Load Interface File for Import scheduled process using the following steps:

1. From the Navigator, click **Tools**.
2. Click **Scheduled Processes**.
3. Click the **Schedule New Process** button.
4. Search and select the Load Interface File for Import job.
5. On the Process Details page:

    a. Select the target import process.
    b. Enter the data file name.

6. Submit the process.

If the process is successful, the status is SUCCEEDED and the process populates the interface tables. If the process isn't successful, the status is ERROR.

> **Note:** The data file remains in the content repository after the process ends.

Finding and Submitting the Import Process

Run the appropriate import process to import the data into the interface tables of your Oracle Fusion application.

To import your data into the application tables:

1. From the Navigator, click **Tools**.
2. Click **Scheduled Processes**.
3. Click the **Schedule New Process** button.
4. Search and select the import process for the target application tables.
5. On the Process Details page, select the process that corresponds to the data that you're importing. For example, **Journal Import**.

   If you prepared your data using the spreadsheet template, select the process shown in the Overview section of the spreadsheet.
6. Submit the process.

If the process is successful, the status is SUCCEEDED. The data in the interface tables is validated and the successful records are imported into the Oracle Fusion application tables. If the process isn't successful, the status is ERROR.

> **Note:** For more information on the process used for data prepared using the spreadsheet template, see the Instructions and CSV Generation tab of the spreadsheet template.

Correcting Import Load Process Errors: Explained

The Load Interface File for Import process ends in error if the load of the data file fails on any row. The Load File to Interface child process ends as an error or warning. All rows that were loaded by the process are deleted and the entire batch of records is rejected.

Correcting Data Upload Errors

To correct errors:

1. Review the error logs.
2. Change any structural or formatting anomalies in the data.
3. Generate the ZIP file containing the CSV files using the template.
4. Upload the file to the UCM server and resubmit the Load Interface File for Import process.
5. Repeat these steps until the process successfully loads all the data.

Correcting Import Process Errors

If the import process fails with errors:

1. Review the errors in the import log.
2. Correct the error records using the ADFdi correction spreadsheets.

16 Importing and Exporting Setup Data

Configuration Packages: Explained

A Configuration Package contains the setup import and export definition. The setup import and export definition is the list of setup tasks and their associated business objects that identifies the setup data for export as well as the data itself. When you create a configuration package only the setup export and import definition exists. Once you submit export, a snapshot of the appropriate setup data is added to the configuration package using the definition. You can continue making modifications to the setup data in the environment and create a new configuration package any time you need it.

You can generate the setup export and import definition implicitly or explicitly:

- A configuration package is created implicitly when you export setup data for an entire offering or any functional area from the Applications Administration page.
- A configuration package is created explicitly when you export setup data based on an implementation project. This method enables further customization of the configuration packages.

You generate the setup export and import definition by selecting an implementation project and creating a configuration package. The tasks and their associated business objects in the selected implementation project define the setup export and import definition for the configuration package. In addition, the sequence of the tasks in the implementation project determines the export and import sequence.

The tasks and their associated business objects in the selected configuration (offering, functional area or implementation project) define the setup export and import definition for the configuration package. In addition, the sequence of the tasks in the implementation project determines the export and import sequence.

Once a configuration package is exported, the setup export and import definition is locked and cannot be changed; that is, you cannot change the selection (add or remove) of tasks and their associated business objects, change their export and import sequence, nor the scope value selection. However, you can create a new configuration package with such modifications at any time.

Implementation Project Based Export and Import: Explained

Use an implementation project as the source for exporting setup data when you are required to customize the list of tasks or of objects you want to export setup data for.

You must explicitly create a configuration package from the Manage Configuration Packages page to export setup data for an implementation project. You generate the setup export and import definition by selecting an implementation project and creating a configuration package. The tasks and their associated business objects in the selected implementation project define the setup export and import definition for the configuration package. Depending on your needs, when you create a configuration package based on an implementation project, you can also customize some additional aspects, as explained here.

- Exclude some of the business objects from the configuration you selected to export setup data for.

You should limit to use this option when the corresponding setup data is already available in the target instance and therefore no data dependency issues appear during import.

- Change the default import sequence of the business objects

  Change the default import sequence of the business objects. It's strongly recommended that you limit using this option when you need to correct a data dependency issue and you fully understand the data relationships between the business objects of your configuration.

- Filter the setup data to export

Export

During export, appropriate setup data is identified based on the tasks in the implementation project used as source for the configuration package. The setup data in the configuration package is a snapshot of the data in the source application instance at the time of export. Once export completes, you can download the configuration package file as a zipped archive of multiple XML files, move it to the target application instance, and upload and import it. After exporting the setup data you may continue entering new or modifying existing setup data for your configuration. Since the configuration package is a snapshot of the setup data taken at the time export is initiated, you may need to take another snapshot of the same configuration or set of data later. Although you can always create a different configuration package, FSM provides you the ability to take another snapshot of the setup data using the same customized export and import definition by exporting the configuration package multiple times and creating multiple versions. While the export definition remains the same in each version, the setup data can be different if you modified the data in the time period between the different runs of the export process. Since each version of the configuration package has a snapshot of the data in the source instance, you can compare and analyze various versions of the configuration package to see how the setup data changed.

Import

During import, you first upload a configuration package created by the export process and then import the setup data. All setup data contained in the configuration package is imported into the environment you initiate the setup data import from. In the target application instance, the setup import process inserts all new data from the source configuration package that does not already exist, and update any existing data with changes from the source. Setup data that exists in the target instance but not in source will remain unchanged.

Moving Common Reference Objects

Moving Common Reference Objects: Overview

The common reference objects are used by several setup tasks in the Setup and Maintenance work area. The common reference objects become a part of the configuration package that is created for an implementation project. While moving the application content, for example, moving from test to the production phase of an implementation, attend to the nuances of these common reference objects.

Parameters

The common reference objects are represented as business objects. A single object can be referenced in multiple setup tasks with different parameters. In the configuration package created for the implementation project, parameters passed to a setup task are also passed to the business objects being moved. As a result, the scope of the setup tasks is maintained intact during the movement.

Dependencies

Common reference objects may have internal references or dependencies among other common reference objects. Therefore, you must note all the dependencies before moving the objects so that there are no broken references among them.

Business Objects for Moving Common Reference Objects: Points to Consider

Common reference objects in Oracle Fusion Functional Setup Manager are used to move application setup content from one environment to another. For example, from a test environment to a production environment.

Choice of Parameters

The following table lists the business objects, the movement details, and the effect of the setup task parameter on the scope of the movement.

Note:

- You can move only the translations in the current user language.
- You can move the Oracle Social Network business objects and the Navigator menu customizations using the customization sets on the Customization Migration page.

Business Object Name	Moved Functional Item	Effect on the Scope of Movement
Application Message	Messages and associated tokens	No parameters: All messages are moved. Parameter moduleType/ moduleKey Only messages belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. Parameter messageName/ applicationId Only the specified message is moved.
Application Taxonomy	Application taxonomy modules and components	No parameters: All taxonomy modules and components are moved.
Application Attachment Entity	Attachment entities	No parameters: All attachment entities are moved. Parameter moduleType/ moduleKey Only attachment entities belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.
Application Attachment Category	Attachment categories and category-to-entity mappings	No parameters: All attachment categories and category-to-entity mappings are moved.

Business Object Name	Moved Functional Item	Effect on the Scope of Movement
		Parameter moduleType/ moduleKey Only attachment categories belonging to the specified module and its descendant modules in the taxonomy hierarchy along with the respective category-to-entity mappings are moved.
Application Document Sequence Category	Document sequence categories	No parameters: All categories are moved. Parameter moduleType/ moduleKey Only categories belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. Parameter code/ applicationId Only the specified document sequence category code is moved.
Application Document Sequence	Document sequences and their assignments	No parameters: All sequences are moved. Parameter moduleType/ moduleKey Only document sequences belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved Parameter name: Only the specified document sequence is moved.
Application Descriptive Flexfield	Descriptive flexfield registration data and setup data	No parameters: All descriptive flexfields are moved. Parameter moduleType/ moduleKey Only descriptive flexfields belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. Parameter descriptiveFlexfieldCode/ applicationId Only the specified descriptive flexfield is moved. Importing the metadata of a flexfield can change its deployment status. Therefore, you must redeploy if there are any affected flexfields. The import process automatically submits affected flexfields for redeployment. Also only flexfields with a deployment status of Deployed or Deployed to Sandbox are eligible to be moved.
Application Extensible Flexfield	Extensible flexfield registration data and setup data, including categories	No parameters: All extensible flexfields are moved Parameter moduleType/ moduleKey Only extensible flexfields belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. Parameter extensibleFlexfieldCode/ applicationId Only the specified extensible flexfield is moved. Importing the metadata of

Business Object Name	Moved Functional Item	Effect on the Scope of Movement
		a flexfield can change its deployment status and therefore, the affected flexfields must be redeployed. The import process automatically submits affected flexfields for redeployment. Also, only flexfields with a deployment status of Deployed or Deployed to Sandbox are eligible to be moved.
Application Key Flexfield	Key flexfield registration data and setup data	No parameters: All key flexfields are moved. Parameter moduleType/ moduleKey Only key flexfields belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. Parameter keyFlexfieldCode/ applicationId Only the specified key flexfield is moved. Importing the metadata of a flexfield can change its deployment status and therefore, the affected flexfields must be redeployed. The import process automatically submits affected flexfields for redeployment. Only flexfields with a deployment status of Deployed or Deployed to Sandbox are eligible to be moved.
Application Flexfield Value Set	Value set setup data	No parameters: All value sets are moved. Parameter moduleType/ moduleKey Only value sets belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. Parameter valueSetCode: Only the specified value set is moved. Importing the metadata of a value set can change the deployment status of flexfields that use the value set. Therefore, you must redeploy if there are any affected flexfields. The import process automatically submits affected flexfields for redeployment.
Application Reference Currency	Currency data	No parameters: All currencies are moved.
Application Reference ISO Language	ISO language data	No parameters: All ISO languages are moved.
Application Reference Industry	Industry data including industries in territories data	No parameters: All industries are moved.
Application Reference Language	Language data	No parameters: All languages are moved.
Application Reference Natural Language	Natural language data	No parameters: All natural languages are moved.

Business Object Name	Moved Functional Item	Effect on the Scope of Movement
Application Reference Territory	Territory data	No parameters: All territories are moved.
Application Reference Time zone	Time zone data	No parameters: All time zones are moved.
Application Standard Lookup	Standard lookup types and their lookup codes	No parameters: All standard lookups are moved. Parameter moduleType/ moduleKey Only standard lookups belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. Parameter lookupType: Only the specified common lookup is moved.
Application Common Lookup	Common lookup types and their lookup codes	No parameters: All common lookups are moved. Parameter moduleType/ moduleKey Only common lookups belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. Parameter lookupType: Only the specified common lookup is moved.
Application Set-Enabled Lookup	Set-enabled lookup types and their lookup codes	No parameters: All set-enabled lookups are moved. Parameter moduleType/ moduleKey Only set-enabled lookups belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. Parameter lookupType: Only the specified set-enabled lookup is moved.
Application Profile Category	Profile categories	No parameters: All profile categories are moved. Parameter moduleType/ moduleKey Only categories belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. name/ applicationId Only the specified category is moved.
Application Profile Option	Profile options and their values	No parameters: All profile options and their values are moved. Parameter moduleType/ moduleKey Only profile options and their values belonging to the specified module are moved.

Business Object Name	Moved Functional Item	Effect on the Scope of Movement
		Parameter profileOptionName: Only the specified profile option and its values are moved.
Application Profile Value	Profile options and their values	No parameters: All profiles and their values are moved. Parameter moduleType/ moduleKey Only profiles and their values belonging to the specified module are moved. Parameter categoryName/ categoryApplicationId Only profiles and their values belonging to the specified category are moved. Parameter profileOptionName: Only the specified profile and its values are moved.
Application Reference Data Set	Reference data sets	No parameters: All sets are moved.
Application Reference Data Set Assignment	Reference data set assignments	Parameter determinantType: Only assignments for the specified determinant type are moved. Parameter determinantType/ referenceGroupName Only assignments for the specified determinant type and reference group are moved.
Application Tree Structure	Tree structures and any labels assigned to the tree structure	No parameters: All tree structures (and their labels) are moved. Parameter moduleType/ moduleKey Only tree structures (and their labels) belonging to the specified module are moved. Parameter treeStructureCode: Only the specified tree structure (with its labels) is moved.
Application Tree	Tree codes and versions	No parameters: All trees are moved. Parameter moduleType/ moduleKey Only trees belonging to the specified module are moved. Parameter treeStructureCode: Only trees belonging to the specified tree structure are moved. Parameter TreeStructureCode/ TreeCode Only trees belonging to the specified tree structure and tree code are moved.
Application Tree Label	Tree structures and any labels assigned to the tree structure	No parameters: All tree structures (and their labels) are moved.

Business Object Name	Moved Functional Item	Effect on the Scope of Movement
		Parameter moduleType/ moduleKey Only tree structures (and their labels) belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. Parameter treeStructureCode: Only the specified tree structure (with its labels) is moved.
Application Data Security Policy	Database resources, actions, conditions, and data security policies	No parameters: All database resources/ actions/ conditions/ policies are moved. Parameter moduleType/ moduleKey Only database resources/ actions/ conditions/ policies belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. Parameter objName: Only the specified database resource along with its actions/ conditions/ policies is moved. If the policies being moved contain reference to newly created roles, move the roles before moving the policies. If the source and target systems use different LDAPs, manually perform the GUID reconciliation after moving the data security policies.

Moving Related Common Reference Objects: Points to Consider

Certain common reference objects may use other common reference objects creating dependencies among the objects. During the movement of common reference objects, ensure that these dependencies or references aren't broken or lost.

Dependencies

The dependencies among the common reference objects may be caused by any of the following conditions.

- Flexfield segments use value sets
- Value sets may make use of standard, common, or set-enabled lookups
- Key flexfields may have an associated tree structure and key flexfield segments may have an associated tree code
- Tree codes and versions may be defined over values of a value set
- Data security policies may be defined for value sets that have been enabled for data security

You may decide to move one, some, or all of the business objects by including the ones you want to move in your configuration package. For example, you may decide to move only value sets, or move both value sets and their lookups as part of the same package. Whatever be the combination, Oracle recommends that during the movement of objects, you follow an order that maintains the dependencies among the objects.

While moving the business objects, adhere to the following order:

1. Move created taxonomy modules before moving any objects that reference them, such as flexfields, lookups, profiles, messages, and so on.

2. Move created currencies before moving any objects that reference them, such as territories.
3. Move created territories before moving any objects that reference them, such as languages and natural languages.
4. Move created ISO languages before moving any objects that reference them, such as languages, natural languages, and industries.
5. Move created tree structures before moving any objects that reference them, such as trees or tree labels.
6. Move created profile options before moving any objects that reference them, such as profile categories or profile values.
7. Move created attachment entities before moving any objects that reference them, such as attachment categories that reference them.

Note: In scenarios where there may be dependencies on other objects, you must move the dependencies before moving the referencing object. For example, if data security policies have dependencies on newly created security roles, you must move the security roles before moving the security policies.

Using Seed Data Framework to Move Common Reference Objects: Points to Consider

To move the common reference objects, you can use the Seed Data Framework (SDF). You can also use the command line interface of SDF to move the object setup data. For more information about seed data loaders including common reference object loaders, see Oracle Fusion Applications Developer's Guide.

Movement Dependencies

The seed data interface moves only the setup metadata. For example, if you use SDF to import flexfield metadata, the flexfield setup metadata is imported into your database. However, you must initiate the flexfield deployment process separately after seed data import to regenerate the runtime flexfield artifacts in the target environment. Similarly, if you use SDF to import data security metadata, you must first move any new referenced roles and then manually run the GUID reconciliation where required.

To ensure that the reference data is not lost during the movement, certain guidelines are prescribed. It is recommended that you perform the movement of object data exactly in the order given below.

Note: Only the translation in the current user language is moved.

1. Move created taxonomy modules before moving any objects that reference them, such as flexfields, lookups, profiles, attachments, reference data sets, document sequences, messages, and data security.
2. Move created currencies before moving any objects that reference them, such as territories.
3. Move created territories before moving any objects that reference them, such as languages and natural languages.
4. Move created ISO languages before moving any objects that reference them, such as languages, natural languages, and industries.
5. Move created tree structures before moving any objects that reference them, such as trees or tree labels.
6. Move created profile options before moving any objects that reference them, such as profile categories or profile values.
7. Move created attachment entities before moving any objects that reference them, such as attachment categories that reference them.
8. Move created reference data sets before moving any objects that reference them, such as reference data set assignments and set-enabled lookups.
9. Move created document sequence categories before moving any objects that reference them, such as document sequences.

10. Move created tree labels before moving any objects that reference them, such as trees.
11. Move created data security objects and policies before moving any objects that reference them, such as value sets.
12. Move created value sets before moving any objects that reference them, such as flexfields.
13. Move created trees before moving any objects that reference them, such as key flexfields.

Glossary

action

The kind of access, such as view or edit, named in a security policy.

assignment

A set of information, including job, position, pay, compensation, managers, working hours, and work location, that defines a worker's or nonworker's role in a legal employer.

autosuggest

Suggestions that automatically appear for a search field, even before you finish typing your search term. You can select any of the suggestions to run your search.

available hours

Hours on the resource's calendar that are, or can be, consumed with project assignments and nonproject events.

balancing segment

A chart of accounts segment used to automatically balance all journal entries for each value of this segment.

business function

A business process or an activity that can be performed by people working within a business unit. Describes how a business unit is used.

business object

A resource in an enterprise database, such as an invoice or purchase order.

business unit

A unit of an enterprise that performs one or many business functions that can be rolled up in a management hierarchy.

chart of accounts

The account structure your organization uses to record transactions and maintain account balances.

competency

A type of qualification that represents a piece of knowledge, a skill, an aptitude, or an attribute that is measurable and demonstrated by a resource in the work context.

condition

The part of a data security policy that specifies what portions of a database resource are secured.

context

A grouping of flexfield segments to store related information.

context segment

The flexfield segment used to store the context value. Each context value can be associated with a different set of context-sensitive segments.

context-sensitive segment

A flexfield segment that may or may not appear depending upon a context. Context-sensitive segments are custom attributes that apply to certain entity rows based on the value of the context segment.

CORS

Acronym for Cross-Origin Resource Sharing. A web service standard to enable a client application running in one domain to retrieve resources from another domain, using HTTP requests.

cost center

A unit of activity or a group of employees used to assign costs for accounting purposes.

cost organization

A grouping of inventory organizations that indicates legal and financial ownership of inventory, and which establishes common costing and accounting policies.

data security

The control of access and action a user can take against which data.

data security policy

A grant of entitlement to a role on an object or attribute group for a given condition.

database resource

An applications data object at the instance, instance set, or global level, which is secured by data security policies.

delegate

A participant who can view project labor demand on the Project Hierarchy Dashboard and acts on behalf of the owner. Delegates can add or delete delegates, viewers, and other owners of an EPS element.

descriptive flexfield

Customizable expansion space, such as fields used to capture additional descriptive information or attributes about an entity, such as a customer case. You may configure information collection and storage based on the context.

determinant

A value that specifies the use of a reference data set in a particular business context.

division

A business-oriented subdivision within an enterprise. Each division is organized to deliver products and services or address different markets.

document sequence

A unique number that is automatically or manually assigned to a created and saved document.

elapsed schedule

Elapsed schedules define the number of hours to be worked on a day, but not the precise start and end times. For example, all resources work eight hours on Monday, but some resources may start at 8 AM, while others start at 1 PM.

entitlement

Grant of access to functions and data. Oracle Fusion Middleware term for privilege.

EPS

Abbreviation for enterprise project structure. A hierarchical representation of projects based on a user-defined classification for accumulation and roll up of project data for reporting purposes. For example, project executives want to see the demand for resources in all construction projects in an organization.

expenditure type

Classification of cost that you assign to each expenditure item in Project Financial Management applications.

feature choice

A selection you make when configuring offerings that modifies a setup task list, or a setup page, or both.

flexfield

A flexible data field that you can customize to contain one or more segments or store additional information. Each segment has a value and a meaning.

flexfield segment

An extensible data field that represents an attribute and captures a value corresponding to a predefined, single extension column in the database. A segment appears globally or based on a context of other captured information.

FTE

Abbreviation for full-time equivalent, such as .5 for half-time work.

global area

The region at the very top of the user interface that remains the same no matter which page you're on.

global search

The search in the global area that lets you search across many business objects.

import

In the context of data integration, the transfer of data from interface tables to **application tables**, where the data is available to application users.

incident

A collection of diagnostic information about a critical error, providing details about the state of the application when the issue occurred.

infolet

A small, interactive widget on the home page that provides key information and actions for a specific area, for example social networking or your personal profile. Each infolet can have multiple views.

inventory organization

A logical or physical entity in the enterprise that tracks inventory transactions and balances, stores definitions of items, and manufactures or distributes products.

job

A generic role that is independent of any single department or location. For example, the jobs Manager and Consultant can occur in many departments.

job definition

The metadata that determines what a job does and what options are available to users when they submit the scheduled process. A job is the executable for a scheduled process.

job role

A role, such as an accounts payable manager or application implementation consultant, that usually identifies and aggregates the duties or responsibilities that make up the job.

key flexfield

Configurable flexfield comprising multiple parts or segments, each of which has a meaning either individually or in combination with other segments. Examples of key flexfields are part numbers, asset category, and accounts in the chart of accounts.

keyword

A word or phrase, entered as free-form, unstructured text on a project resource request, that does not exist as a predefined qualification content item. Keywords are matched against the resource's qualifications and the results are included in the qualification score calculation.

layout set

A set of layout configurations that determine the appearance of the time card and calendar when reporting, reviewing, or viewing time.

legal authority

A government or legal body that is charged with powers such as the power to make laws, levy and collect fees and taxes, and remit financial appropriations for a given jurisdiction.

legal employer

A legal entity that employs people.

legal entity

An entity identified and given rights and responsibilities under commercial law through the registration with country's appropriate authority.

legal jurisdiction

A physical territory, such as a group of countries, single country, state, county, parish, or city, which comes under the purview of a legal authority.

legal reporting unit

The lowest level component of a legal structure that requires registrations. Used to group workers for the purpose of tax and social insurance reporting or represent a part of your enterprise with a specific statutory or tax reporting obligation.

legislative data group

A means of partitioning payroll and related data. At least one legislative data group is required for each country where the enterprise operates. Each legislative data group is associated with one or more payroll statutory units.

load

In the context of data integration, the transfer of external data from data files to the receiving **interface tables** in preparation for an import into application tables.

lookup code

An option available within a lookup type, such as the lookup code BLUE within the lookup type COLORS.

lookup type

The label for a static list that has lookup codes as its values.

managed project enterprise labor resource

A project enterprise labor resource whose availability and staffing are managed in Oracle Fusion Project Resource Management. You use managed project enterprise labor resources to fulfill project resource requests and directly assign to one or more projects.

milestone

A reference point marking the completion of a significant event in a project. Use milestone tasks to track the completion work on a significant set of tasks or payments for deliverables.

Navigator

The menu in the global area that you can use to open the work areas and dashboards that you have access to.

offering

A comprehensive grouping of business functions, such as Sales or Product Management, that is delivered as a unit to support one or more business processes.

owner

A participant who can view project labor demand on the Project Hierarchy Dashboard and is directly responsible for the projects assigned to the EPS element. Owners can add or delete delegates, viewers, and other owners of an EPS element.

payroll statutory unit

A legal entity registered to report payroll tax and social insurance. A legal employer can also be a payroll statutory unit, but a payroll statutory unit can represent multiple legal employers.

position

A specific occurrence of one job that is fixed within one department. It is also often restricted to one location. For example, the position Finance Manager is an instance of the job Manager in the Finance Department.

primary ledger

Main record-keeping ledger.

primary project role

Defines the type of work that a resource typically performs on projects, such as project manager, project accountant, or technical lead.

privilege

A grant of access to functions and data; a single, real world action on a single business object.

process set

A scheduled process that contains multiple individual processes or other process sets.

profile option

User preferences and system configuration options that users can configure to control application behavior at different levels of an enterprise.

project calendar

Defines the work schedule for project assignments. The project calendar includes working days and hours, such as Monday through Friday for 8 hours a day, and any exceptions, such as holidays.

project enterprise labor resource

A labor resource that you can assign to multiple projects.

project expenditure organization

An organization that can incur expenditures and hold financial plans for projects.

project resource request

List of criteria used to find a qualified resource to fulfill an open resource demand on a project. Project resource requests include qualifications, keywords, requested date range, and other assignment information, such as project role and work location.

project task code

Enables the capture of organization-specific information for tasks. Implementors can decide whether users must select a value from a predefined value set, enter numeric values, or enter free form text.

projected utilization

Percentage of hours that a resource or resources are confirmed or reserved to work on project assignments compared to the available hours.

qualification

Items in structured content types such as competencies, degrees, and language skills that have specific values and proficiency ratings.

Query By Example

The row of fields directly above table column headers, used for filtering the data in the table.

reference data set

Contains reference data that can be shared across a number of business units or other determinant types. A set supports common administration of that reference data.

reference group

A logical collection of reference data sets that correspond to logical entities, such as payment terms defined across multiple tables or views. Based on the common partitioning requirements across entities, the reference data sets are grouped to facilitate data sharing among them.

registration

The record of a party's identity related details with the appropriate government or legal authorities for the purpose of claiming and ensuring legal and or commercial rights and responsibilities.

resource calendar

A schedule of a resource's available work days and hours, such as Monday through Friday, 8 hours a day.

resource pool

A logical group of resources organized in a hierarchy for purposes of staffing, management, and reporting on utilization.

role

Controls access to application functions and data.

sandbox

A testing environment that isolates untested code changes from the mainline environment so that these changes don't affect the mainline metadata or other sandboxes.

scheduled process

A program that you run to process data and, in some cases, generate output as a report.

segment

A segment is a single field within a flexfield and maps to a single table column in your database. When customizing a flexfield, you define the appearance and meaning of individual segments.

set enabled

A property that describes entities that an organization shares as reference data. For example, you can indicate a lookup, customer, location, or document attachment as set enabled.

springboard

The grid of icons on the home page or the strip of icons above all simplified pages. Use the icons to open pages.

suggestion group

Category of suggestions that appear in the autosuggest for the global search.

summarization

The summarization or update project performance data process extracts data related to actual cost, commitment, budget, forecast, revenue, and invoice transactions and prepares the data for reporting purposes.

task date constraint

A restriction that you place on a task to control the task start or end date. For example, you can specify that a task must start on or finish on a particular date.

task dependency

A relationship between two tasks in which the start or end date of one task depends on the start or end date of another task. The task that depends on the other task is the successor, and the task that it depends on is the predecessor. The four types of task dependencies are Finish-to-Start, Start-to-Start, Finish-to-Finish, and Start-to-Finish.

territory

A legally distinct region used in the country field of an address.

time category

A defined classification of the types of time entries, such as worked time or scheduled time, that can be referenced in rules, time summaries, and analytics. Time categories can contain other time categories. For example, the Absence time category contains Sickness and Vacation time categories.

time consumer set

Specifies approval periods, time category and validation actions, and time transfer rules for each time consumer. A consumer set might be for either a payroll or project costing time consumer, or both.

tree

Information or data organized into a hierarchy with one or more root nodes connected to branches of nodes. A tree must have a structure where each node corresponds to data from one or more data sources.

value set

A set of valid values against which values entered by an end user are validated. The set may be tree structured (hierarchical).

viewer

A participant who can only view the labor demand of an EPS element on the Project Hierarchy Dashboard. Viewers can't add or remove other participants.

work relationship

An association between a person and a legal employer, where the worker type determines whether the relationship is a nonworker, contingent worker, or employee work relationship.

worker time entry profile

A collection of layout rules and specifications that determine the appearance of the time card and control when workers can take action on their time card.

worker time processing profile

A collection of the time card period and the time entry and time calculation rule sets for both the worker and the time consumer.

workflow

An automated process that passes a task from one user (or group of users) to another to view or act on. The task is routed in a logical sequence to achieve an end result.