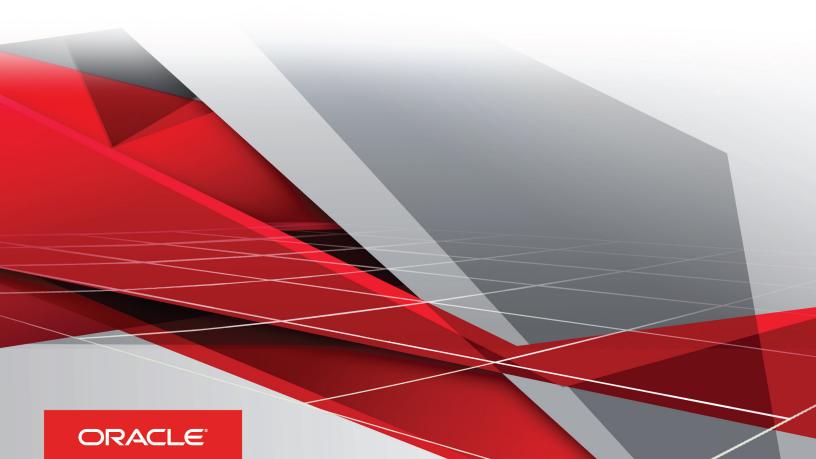
Oracle

Talent Management Cloud Implementing Talent Management Base

Release 12

This guide also applies to on-premises implementations



Oracle® Talent Management Cloud Implementing Talent Management Base

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Oracle Talent Management Cloud Implementing Talent Management Base



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

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1 Overview

Implementing Talent Management Base: Guide Overview

Before you start using any of the Oracle Fusion services in Oracle Talent Management Cloud, you must set up the base functional areas in the Workforce Development offering. This guide describes how to set up these functional areas to implement Talent Management Base. This topic explains the scope of this guide and summarizes the contents of each chapter.

The following table lists the task lists within Workforce Development that are covered in other guides:

Task List	Guide
Define Batch Data Loads	Oracle Human Capital Management Cloud Integrating with Oracle HCM Cloud
Define Extracts	Note: This guide also covers Oracle Taleo Recruiting Cloud Service
Define Security for Workforce Development	Oracle Human Capital Management Cloud Securing Oracle HCM Cloud
Define Transactional Business Intelligence Configuration	Oracle Human Capital Management Cloud Creating and Administering Analytics and Reports

Introduction

Chapter	Title	Contents
1	Overview	An introduction to Talent Management Base and an overview of creating and managing implementing projects.

Application Implementation

Chapter	Title	Contents
2	Synchronization of Users and Roles from LDAP	Initializing Oracle Fusion Applications tables with role information from Oracle Identity Management.



Geographies and Currencies

Chapter	Title	Contents
3	Geographies for HCM	Managing geography structures, hierarchies, and validation, setting up geocoding, and importing geographies.
4	Currencies and Currency Rates	Managing currencies, conversion rate types, and daily rates.

Enterprise and Workforce Structures

Chapter	Title	Contents
5	Enterprise Structures Initial Configuration	An overview of the enterprise structures, modeling an enterprise structure in Fusion, and using the Enterprise Structures Configurator (ESC).
6	Enterprise Structures: Maintenance	Managing reference data sets, legal jurisdictions and authorities, and legal entities for HCM.
7	Workforce Structures: Organizations	Setting up disability organizations, cost centers, departments, and locations. Selecting the employment model, using worker numbers, and person number generation methods.
8	Workforce Structures: Others	Defining grades, jobs, positions, and trees, and managing the worker directory.
9	Workforce Profiles	Using Profile Management to define rating models, content types and content items, talent profiles, content sections, and questionnaires.



Common Applications Configuration

Title	Contents	
Approvals and Notifications	Defining approvals for HCM, managing approval rules, and understanding approver types and approval-rule attributes	
Application Toolkit Configuration	Mapping reports to work areas and setting up watchlist options.	
Help configuration	Understanding help features choices and help options, and creating help security groups.	
Common Reference Objects	Defining application taxonomy and reference data sharing. Managing menu customizations, security and audit policies, oracle social network objects, and messages	
WebLogic Communication	Oracle sales cloud Computer Telephony Integration (CTI) and configuring PSTN gateway address	
Applications Core Configuration	Defining lookups, messages, document sequences, profile options, and attachments	
Trees Setup	Managing tree structures, tree labels, trees, and tree versions.	
Flexfields Setup	Configuring flexfields, managing and deploying flexfields, and managing value sets.	
Flexfields Maintenance	Managing descriptive flexfields, extensible flexfields, and key flexfields.	
	Application Toolkit Configuration Help configuration Common Reference Objects WebLogic Communication Applications Core Configuration Trees Setup Flexfields Setup	

Common HCM Configuration

Chapter	Title	Contents
19	Workforce Records	Defining availability, person and employment records, and documents, and scheduling process for portrait gallery.



Chapter	Title	Contents
20	Eligibility Profiles	Defining derived factors, user-defined criteria, and eligibility profiles.
21	Predictive Models for HCM	Running predictive models for HCM, creating and editing predictive attributes, and removing predictive models.

Others

Chapter	Title	Contents
22	Other Setup and Maintenance Task	An overview of transactional business intelligence configuration, extensions, and contextual addresses
23	Import and Export of Setup Data	Understanding creating configuration packages and moving common reference objects

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.

- 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.





2 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.





3 Geographies for HCM

Geography Structure, Hierarchy, and Validation: How They Fit Together

There are three components that are dependent on each other when defining a country: geography structure, geography hierarchy, and geography validation. Every country has to have the geography structure defined first before the hierarchy can be defined, and the geography hierarchy has to be defined before the validation can be defined.

Geography Structure

Firstly, you need to create a geography structure for each country to define which geography types are part of the country structure, and how the geography types are hierarchically related within the country structure. For example, you can create geography types called State, City, and Postal Code. Then you can rank the State geography type as the highest level within the country, the City as the second level, and the Postal Code as the lowest level within the country structure. Geography structure can be defined using the **Manage Geographies** task, or can be imported using tasks in the **Define Geographies** activity.

Geography Hierarchy

Once the geography structure is defined, the geographies for each geography type can be added to the hierarchy. For example, below the United States you can create a geography called California using a State geography type.

As part of managing the geography hierarchy you can view, create, edit, and delete the geographies for each geography type in the country structure. You can also add a primary and alternate name and code for each geography. A geography hierarchy can be created using the **Manage Geographies** task, or can be imported using tasks in the **Define Geographies** activity.

Geography Validation

After defining the geography hierarchy, you need to specify the geography validations for the country. You can choose which address style formats you would like to use for the country, and for each selected address style format you can map geography types to address attributes. You can also select which geography types should be included in geography or tax validation, and which geography types will display in a list of values during address entry in other user interfaces. The geography validation level for the country, such as error or warning, can also be selected.

Geography Structures: Explained

This topic describes geography structures and the tasks you can perform using geography structures.

A geography structure is a hierarchical grouping of geography types for a country. For example, the geography structure for the United States is as follows:



Level	Geography Type
1	State
2	County
3	City
4	Postal Code

You can use the geography structure to relate geography types for a country and define geography types for a country.

Relate Geography Types for a Country

You can determine how a country's geographies are hierarchically related by creating the hierarchy of the geography types in the geography structure. When you define a country's structure, the geography type Country is implicitly at the top of the geography structure with the level 1. The subsequent geography types that you add after country are numbered in sequence.

You must add a geography type as a level in the country structure before you can define a geography for that geography type in a country. For example, before defining the state of California, the State geography type must be added to the United States country structure. To quickly create country structure, you can copy a structure from another country and modify the geography types for the country.

Define Geography Types for a Country

You can use any of the master reference geography types to create your geography structure. If required, you can create a geography type, before adding it to the country structure. Each geography type is added below the current lowest level.

Note: You cannot delete geography types that have associated geography data. You can only delete the lowest level geography type of the country structure.

A geography type that you create within the country structure can be used for other country structures as well.

Geography Hierarchy: Explained

This topic describes geography hierarchy and various aspects of geography hierarchy.

Geography hierarchy is a data model that creates conceptual parent-child relationships between geographies. The top level of the geography hierarchy is country, which is the parent, and the hierarchy contains several child geographies. The following table shows sample parent-child relationships in a geography.

California	Parent of San Mateo county	
San Mateo County	Parent of Redwood City	
Redwood City	Parent of 94065	
94065	Child	



California

Parent of San Mateo county

When you enter just 94065, the application determines that the postal code is in California and the corresponding city is Redwood City.

The application uses geography hierarchy information to facilitate business processes that rely on geography information, such as, tax calculation, order sourcing rules, and sales territory definition. The geography hierarchy information is centrally located and shared among other application offerings.

The geography hierarchy includes:

- Geography: Geography is a physical space with boundaries that is a defined instance of a geography type, such as country, state, province or city. For example, San Jose is a geography of the City geography type.
- Geography type: Geography types are divisional grouping of user defined geographies, for example, Continent, Country Regions, and Tax Regions.
- Geography usage: Geography usage indicates how a geography type or geography is used in the application.
- Master reference geography hierarchy: The geography hierarchy data is considered the single source of reference for all geography related data such as geography types and geographies.
 - The geography usage for the entire hierarchy is the master reference, and defined geography types and geographies are the master reference geography types and geographies. For example, you can create geography types called State, City, and Postal Code. Then, you can rank the State as the highest level, City as the second level, and Postal Code as the lowest level within the country structure.
- User defined zones: User defined zones are a collection of geographical data, created from master reference data for a specific purpose. For example, while the territory zones are collections of master reference geographies ordered with a hierarchy, the tax and shipping zones are without a hierarchical grouping.

Geography Validation: Explained

Geography validation determines the geography mapping and validation for a country's address styles, as well as the overall geography validation control for a country.

The **No Styles Format** address style format is the default address style format for a country. By defining the mapping and validation for this format you will ensure that validations can be performed for any address in the country. After the **No Styles Format** is defined you can set up additional mapping for specific address styles.

For each address style format, you can define the following:

- Map to attribute
- Enable list of values
- Tax validation
- Geography validation
- Geography validation control

Map to Attribute

For every address style format, you can map each geography type to an address attribute. For example, you can map the **State** geography type to the **State** address attribute for the United States, or map the **State** geography type to the



County address attribute for the United Kingdom. The geography types that appear are based on how the country structure is defined. The list of address attributes that appear are based on address formats delivered with the application, or your customer defined address formats.

Note: You only need to map geography types that you want to use for geography or tax validation purposes.

Enable List of Values

Once a geography type is mapped to an attribute, then you can specify whether the geography type will appear in a list of values during address entry in user interfaces. It is very important to review carefully if you want to enable a list of values. You should only enable a list of values if you have sufficient geography data imported or created for that geography. If the setup for master geography data is incomplete, then the geography data is either not imported or created. As a result, the list of values for the address attribute does not list any geography data.

Once you have enabled a list of values for an address attribute, you can only select the geography data available for the geography type. This means that if a specific geography value is not available in the geography hierarchy, you cannot create an address with a different geography value.

Tax Validation

You can also specify whether a geography type will be included in tax validation. For example, for the United States North America address style format you specify that County, State, and City are used for tax validation. This will mean that when a transaction involves an address with the North America address style, the address must have the correct county, state, and city combination based on the geography hierarchy data, to be considered valid for tax calculation.

Geography Validation

You can specify whether a geography type will be included in geography validation. This will mean that, for example, when the user enters a United States address using the North America address style format, the address must have the correct country, state, and postal code combination based on geography hierarchy data to be considered geographically valid.

If an address element is mapped to a geography type, but not selected for geography validation usage, then during address entry suggested values will be provided for the address element, but the address element will not be validated.

Note: For either the tax or geography validation, do not skip more than one consecutive level unless you are certain that the selected geography types can uniquely identify geographies. For example, the United States country structure is: State, County, City, and Postal Code, and you want to select just State and Postal Code for geography or tax validation. However, for the combination of California and 94065, the city can be either Redwood Shores or Redwood City. In this case, you should also select at least the City geography type for geography or tax validation.

Geography Validation Control

You can select the geography validation level for a country. Validation will check if the entered address maps to the geography hierarchy data available for the country, and the geography validation control determines whether you can save an address that did not pass validation during address entry. For example, if the validation level is **Error**, then an address cannot be saved if the values do not match the geography hierarchy data.

These are the geography validation levels you can choose:

- Error only completely valid addresses can be saved, with all mandatory address elements entered.
- No Validation all addresses can be saved including incomplete and invalid addresses.



Regardless of the result of validation, the validation process will try to map any address attribute to a geography of the country, and store any mapping it could establish based on the available data. This is called **Geography Name Referencing** and it is executed as part of validation. The result of this referencing is used in several business processes in the application to map an address to a specific geography or zone.

The Geography Dimension value in territories is derived from sell-to addresses of sales accounts. To use geography dimensions in territories, you must validate the geography elements in the addresses, such as state, city, and postal code. You can validate the address by enabling geography validation for each country using the Manage Geographies task. Perform the following in the Manage Geographies task:

- Enable at least one level in the geography hierarchy for geography validation.
- Enable geography validation for all geography levels that you intend to use for territory definition for each country.
- If needed, enable a list of values containing specific geography elements. This will help users search and select appropriate geography values during addresses entry and eliminate all possibilities of wrong address entry.

You can set geography validation control to Error in the Manage Geography Validation page. This ensures that users can only use valid geography elements in addresses.

Note: If you have already created addresses before setting up geography validation for a country, you must enabling geography validation and then execute the Run Maintain Geography Name Referencing task for that country. This validates all your geography elements.

Managing Geography Structures, Hierarchies, and Validation: Worked Example

This example shows how to configure the geography structure, hierarchy, and validation for a country geography, using the United Kingdom country geography as an illustration.

The following table summarizes the key decisions for this scenario.

Decisions to Consider	In This Example	
Copy an existing country structure?	No, create a new country structure.	
What is the structure of the geography types?	Create geography types with the following ranking structure:	
	1. County	
	2. Post Town	
What is the geography hierarchy?	Create the following hierarchy:	
	1. Country of United Kingdom	
	2. County of Berkshire	
	3. Post Town of Reading	
Which address style format will you use when mapping geography validations?	The default address style format, called the No Styles Format.	
valuations:		



Decisions to Consider	In This Example
Are you using Oracle Fusion Tax for tax purposes?	No, do not select Tax Validation for the geography types.

Defining the Geography Structure

Add the County and Post Town geography types to the United Kingdom geography structure.

- 1. On the Manage Geographies page, enter GB in the Code field. Click Search.
- 2. On the Manage Geographies page, click Structure Defined.
- 3. On the Manage Geography Structure page, click the **Create** button next to the **Copy Country Structure From** field.
- 4. In the Geography Structure section, select the County list item in the Add Geography Type field.
- Click Add.
- 6. Select the Post Town list item in the **Add Geography Type** field.
- 7. Click Add.

Defining the Geography Hierarchy

To create the geography hierarchy for United Kingdom, add the geographies for the County and Post Town geography types using the geography hierarchy user interfaces. You can also use the Manage File Import Activities task to import geography hierarchies using a .csv or xml file.

- 1. On the Manage Geographies page, enter GB in the Code field. Click Search.
- 2. On the Manage Geographies page, click **Hierarchy Defined**.
- 3. In the Geography Hierarchy section, click United Kingdom to highlight the table row, and click Create.
- 4. In the Create County page, Primary and Alternate Names section, enter Berkshire in the Name field.
- 5. Click Save and Close.
- 6. In the Geography Hierarchy section, click Berkshire to highlight the table row, and click Create.
- 7. In the Create Post Town page, Primary and Alternate Names section, enter Reading in the Name field.
- 8. Click Save and Close.

Defining the Geography Validations

To specify the geography validations for the geography types you added to United Kingdom, define the geography mapping and validation for the United Kingdom default address style format. Then, map the geography types to attributes, enable the geography types for Lists of Values and Geography Validation, and set the geography validation level.

- 1. On the Manage Geographies page, click **Validation Defined**.
- 2. In the Address Style section, click **No Styles Format** to highlight the table row.
- 3. For the County geography type, click the County list item in the Map to Attribute field.
- 4. Select the **Enable List of Values** and **Geography Validation** options.
- 5. For the Post Town geography type, click the City list item in the Map to Attribute field.
- 6. Select the **Geography Validation** option.
- 7. In the Geography Validation Control section, select Error in the Geography Validation Level for Country list.



8. Click Save and Close.

Geocoding: Explained

This topic explains geocoding and how to enable this option in the application.

Geocoding is the process of finding latitude and longitude coordinates from geographic data such as street addresses or zip codes. Once these coordinates are available, you can use the spatial services feature to identify points of interest, such as customer and contact addresses, in the vicinity. The application integrates the Geocoding feature with eLocation (http://elocation.oracle.com/maps_oracle_dot_com_main.html), which is a Geocoding service provided by Oracle.

By default, the Geocoding option is turned off in the application. You can enable the Geocoding option in the **Setup and Maintenance, Manage Geographies** page.

If the Geocoding feature is enabled, the feature can be scheduled to run at regular time intervals. This ensures that newly created or updated locations are picked up and geocoded whenever you create or update an address using the user interface, web services, bulk import, or file-based import.

Related Topics

What are Spatial Services?

Setting Up Geocoding: Procedure

This procedure lists the steps to set up geocoding in Oracle applications.

Geocoding is a process that determines the latitude and longitude coordinates for a location. By default, geocoding is turned off in the application. You can use geocoding to display customers in the vicinity of a mobile address.

Enabling Geocoding for a Country

To enable geocoding for a country, complete these steps:

- 1. From the Setup and Maintenance work area, search for Manage Geographies and click Go to Task.
- 2. Search the country for which you want to enable geocoding. You can either search by the country name or country code.
- 3. Click **Search**. The search results for the matching country names are displayed.
- 4. Select the country for which you want to enable the geocoding option.
- 5. Select **Geocoding Defined** for the country.

Populating Location Latitude and Longitude Information

Once geocoding is enabled, you can schedule this feature to run at regular time intervals so that newly created or updated locations are picked up and geocoded. To schedule the geocoding feature to run at regular intervals, complete these steps:

- 1. Navigate to the Scheduled Processes work area, and click Schedule New Process.
- 2. Click the Name drop-down and search for Populate Location Latitude and Longitude Information, and then click OK.
- 3. Enter the parameters such as Start Date and End Date, and click **Submit**.



Importing Geographies: Explained

A geography, such as Tokyo or Peru, describes a boundary on the surface of the earth. You can create new geographies by importing data through interface tables. There are two options for populating the interface tables: using the tool of your preference to load the data or using file-based data import. If you plan to provide the data details in a source file, use the file-based import feature. If you will populate the interface table directly, run the geography loader process to import the data. Having a good understanding of the import entity, interface table, and destination table will help you prepare your import data.

Consider the following when importing geographies:

- Nokia geography reference data
- File-based import option
- Geography loader process option
- Import object entity, interface table, and destination tables

Nokia Geography Reference Data

Oracle Sales Cloud includes third-party (Nokia) master geography data for multiple countries that can be easily imported. You can import Oracle-licensed Nokia data from Navteq, for those countries where the data is available, such as the U.S. You can import Nokia Geography data using the **Manage Geographies** task. Search for the country, and select **Import Nokia Data** from the **Actions** menu. If the licensed Navteq data is not available for a particular country, then the **Import Nokia Data** action is disabled.

File-Based Import Option

The file-based import process reads the data included in your XML or text file, populates the interface tables, and imports the data into the application destination tables. The **File-Based Data Import Setup and Maintenance** task list includes the tasks needed to configure the geography import object, create source file mappings, and schedule the import activities.

Geography Loader Process Option

Populate the interface table with your import data, then navigate to the **Run Geography Loader Setup and Maintenance** task to schedule the import of data from the interface table to the destination table.

Import Object Entity, Interface Table, and Destination Tables

The geography import object consists of one entity and interface table that forms the geography. If you are using file-based import, you can map your source file data to import entity attributes that correspond to the interface table columns. The import activity process populates the interface table based on the mapping and your source file. If using the geography loader scheduled process, populate the interface table directly using your preferred tool. If you need the unique IDs of existing application data for your import data, use the **Define Data Export Setup and Maintenance** task list to export the information.

The following lists the object entity, tables, and resulting application object:

File-Based Import Entities	Interface Tables	Destination Tables	Application Object
ImpGeography	HZ_ IMP_ GEOGRAPHIES_T	HZ_GEOGRAPHIES	Geography



File-Based Import Entities	Interface Tables	Destination Tables HZ_ GEOGRAPHY_ IDENTIFIERS	Application Object
		HZ_ GEOGRAPHY_ TYPES_B	
		HZ_ HIERARCHY_ NODES	

Replacing Existing Master Geography Data with Revised Nokia Geography Data: Procedure

You must import and set up reference geography data for the countries where you do business. Using the Nokia geography reference data, you no longer have to source geography data from a third party. You can import Oracle-licensed Nokia data from NAVTEQ, including the country structure and hierarchy information, either to create a new geography setup or replace your existing geography data.

This topic describes the steps to replace your existing master geography data with the revised Nokia geography data.

Creating an Export File of All Territories

You must export all territories before deleting the master geography data because removing the master geography data invalidates the territory definitions that are based on the Geography dimension. You can either export the definitions of all territories to a file or make manual corrections. If there are a large number of territories, export the territories definition to a file that can be used during the territories import process. However, if there are very few affected territories, then you can choose to either export the territories definition to a file or make corrections manually.

This procedure is applicable only if there are territories defined using the Geography dimension.

Perform the following steps to create an export file of all territories.

- 1. From the Territories and Quotas work area, click **View Active Territories** in the Tasks pane.
- 2. In the View Active Territories page, select the top territory.
- 3. Click the Actions drop-down list, and select Export, and then Export Selected Territory Hierarchy.
- 4. In the Warning dialog box, click **OK**.
- 5. Click the **Actions** drop-down list and select **Export**, and then **View Export** Status.
- **6.** Review the status of the export job and verify if it has completed successfully.
- 7. In the Exported Data File column, click the .zip file against your export job, and click **Save**. All the territories are exported to a compressed file on your system.
- 8. Click OK.
- 9. Click **Done** in the View Active Territories page.

Deleting the Territory Geography Data

A territory definition has references to the territory geography data and master geography data. Since territory geography data is based on the master geography data, you must delete the territory geography data prior to deleting the master geography data. When you delete the territory geography data, all territories that are defined using geography dimension become invalid.

This procedure is applicable only if territory geographies are defined.



Perform the following steps to delete the territory geography data.

- 1. From the Setup and Maintenance work area, search for Manage Territory Geographies and click Go to Task.
- 2. In the Manage Territory Geographies page, click **View All Hierarchies**.
- 3. Select the top node for the country for which you want to replace the master geography data and click the **Delete** icon.
- 4. In the Warning dialog box, click **OK**.
- 5. In the Confirmation dialog box, click **OK**. The parent node of the territory geography data and its children are deleted.
- 6. Repeat steps 3 to 5 to delete all top nodes in the territory geography data.
- 7. Click Save and Close.

Although the territory geography data is deleted, the territory definitions may appear to remain valid. This is because the Territory Management application retains a copy of the dimension members referenced in the territory definitions. This copy is updated when you trigger the **Load and Activate** process from the **Enable Dimensions and Metrics** task.

Deleting the Master Geography Data

To delete the master geography data for a country, you must create a support request with proper justification. Note that when the master geography data is deleted, the geography and its children are deleted and all the related territory, tax, and shipping zone references become invalid. So you must take backup of these before deleting the master geography data.

Importing Nokia Geography Reference Data

Use this procedure to import Nokia geography reference data licensed by Oracle. If the country data you want to import is not available, then the Import Nokia Data action is disabled.

The geography data is provided by Nokia and is third-party content. As per Oracle policy, this software and documentation may provide access to or information about content and services from third parties. Oracle and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content and services. Oracle and its affiliates are not responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Perform the following steps to import Nokia geography reference data. Currently, the revised Nokia geography reference data is available only for US at this time.

- 1. From the Setup and Maintenance work area, search for Manage Geographies, and click Go to Task.
- 2. In the Manage Geographies page, enter either the country name or the two-letter ISO code (for example, US), and click **Search**.
- **3.** Select the country in the search results.
- 4. Click the Actions drop-down list, and select Import Nokia Data.
- 5. In the Warning dialog box, click **OK**.
- 6. In the Confirmation dialog box, click **OK**.

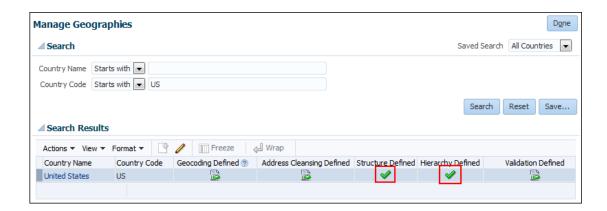
The import of larger countries may require several hours to complete.

You can track the progress of the import process by selecting **Scheduled Processes** from the Navigator menu.

Note: To access the Scheduled Processes work area, you must be signed in as a user with the Employee abstract role. The initial user does not have this role assigned, but the other users you created do.



After the import is complete, you can search for the country again in the Manage Geographies page. Check marks now appear in the **Structure Defined** and **Hierarchy Defined** columns indicating the import completed successfully.



Next, click the **Validation Defined** icon to define the validations, enable List of Values, and choose address style format for a country as set up before. For more information, see the "Geography Validation: Explained" topic.

The **Geocoding Defined** and **Address Cleansing Defined** columns are used for additional features which you must license from Oracle and set up separately.

- Geocoding makes it possible to display customers in the vicinity of a mobile address. You set up **Geocoding** Enabled for those countries where you are using Around Me functionality in Sales Cloud Mobile.
- Cleansing makes it possible to validate addresses down to the street level.

Running the Geography Name Referencing Process

The Geography Name Referencing (GNR) process validates address elements in location tables, such as HZ_LOCATIONS, against the master geography data.

Perform the following steps to run the GNR process.

- 1. Navigate to the Scheduled Processes work area, and click Schedule New Process.
- Click the Name drop-down list and search for Validate Geographies Against Master Geographies, and then click OK.
- 3. Click **OK** in the Schedule New Process dialog box.
- 4. In the Process Details dialog box, enter the following details:
 - Location Table Name: HZ_LOCATIONS
 - Run Type: ALL
 - Usage Code: GEOGRAPHY
- 5. Enter the country code in the Country Code field.
- 6. Click Submit.
- 7. In the Confirmation dialog box, click **OK**.
- 8. Click Close.
- 9. In the Scheduled Processes page, click the **Refresh** icon.
- 10. Verify if the status of the process has completed successfully.



Recreating and Loading the Territory Geography Data

You can recreate the territory geography data, after the master geography data is imported, using either of the following methods:

- Import process: If you created the original territory geography data using the import process, then use the same import file to recreate the territory geography structure.
 - For more information about importing the territory geography data using the import file, see "Importing Territory Geography Hierarchies Using File-Based Data Import: Quick Start" in the Oracle Sales Cloud Understanding File-Based Data Import and Export guide.
- Manual creation process: You can manually recreate the territory geography data structures, as they existed before their deletion, using the Manage Territory Geographies task.

For more information about creating zones and adding geographies to a zone, see "Managing Territory Geographies: Worked Example" topic.

After you have recreated the territory geography data, perform the following steps to load the data.

- 1. From the Setup and Maintenance work area, search for Enable Dimensions and Metrics, and click Go to Task.
- In the Enable Dimensions and Metrics page, click the Actions drop-down list, and select Load and Activate.
 The process loads the territory geography data to make dimension members available for selection when defining territories.
- 3. In the Confirmation dialog box, click **OK**.
- 4. Click Done.

Restoring the Invalid Territory Definitions

After recreating the territory geography hierarchies and running the Load and Activate option from the **Enable Dimensions** and **Metrics** task, the geography dimensions are populated with the new geography members. The geography members in the territory appear as invalid because your territories still reference the old copies of the dimension members that were deleted. The new members are not referenced automatically by the territories. You must re-reference the territory definitions from the old geography dimension members to the new ones.

You can restore the invalid territory definitions by either importing the previously created export file or making manual corrections to the territories.

- Restoring Valid Territory Definitions Using Territories Import
 - a. Open the export file you saved in the "Creating an Export File of All Territories" step. The compressed file contains four CSV files.
 - b. Open TERR HEADER.CSV file.
 - c. Enter **REPLACE** in the Action column for all territories that are based on geography dimension.
 - d. Save the file in CSV format and compress it together with three other CSV files.
 - e. From the Territories and Quotas work area, click **View Active Territories** in the Tasks pane.
 - f. Click the Actions drop-down list, and select Import to Proposal, and then Import Territories.
 - g. Select the newly created compressed file and click **OK**.
 - h. Click the Actions drop-down list and select Import to Proposal, and then View Import Status.
 - i. Review the status of the export job and verify if it has completed successfully.
 - j. Click OK.
 - k. From the Tasks pane, click Manage Territory Proposals.



- I. In the Manage Territory Proposals page, under Current Territory Proposals table, search for the proposal with your import file name.
- m. Click the import file name to open the territory proposal.
- **n.** Click **Edit Coverage** to verify that the territory definitions are valid.
- o. Verify that there are no values listed as invalid in the Selected Dimension Members section.
- p. Click Save and Close.
- q. Click Activate. The territory proposal of your import file is activated.
- Restoring Valid Territory Definitions through Manual Corrections

Although this method is always applicable, it is most appropriate when you have to restore territory definitions for a smaller number of territories.

- a. From the Territories and Quotas work area, click Manage Territory Proposals in the Tasks pane.
- **b.** In the Manage Territory Proposals page, click the **Create** icon.
- c. In the Create Territory Proposals dialog box, enter a name and click Save and View.
- **d.** In the Territory Proposals page, add all the territories with the Geography dimension value other than the value "Any" to the proposal.
- e. Select a territory and click Edit Coverage.
- **f.** In the Edit Coverage page, select **Geography** from the Dimensions drop-down list. The invalid dimension members are displayed in the Selected Dimension Members pane.
- **g.** Expand the values in the Available Dimension Members section or search for the member that has the same name as the one marked invalid in the Selected Dimension Members pane.
- h. Select one or more new geography dimension members from Available Dimension Members pane and click **Add** icon to the Selected Dimension Members pane.
- i. Click the **Remove** icon to remove the invalid members from the Selected Dimension Members pane.
- i. Click Save and Close.
- **k.** Repeat steps 4 to 10 for all territories that were based on Geography dimension.
- I. Click **Activate**. After the activation process is complete, your territory definitions are valid again and are referencing to the new geography data.
- Running Batch Assignment Process for Opportunities
 - a. From Navigator, click Scheduled Processes.
 - **b.** In the Schedule Processes page, click **Schedule New Process**.
 - c. In the Schedule New Process dialog box, search for the Revenue Territory Based Assignment process and select it.
 - d. Click OK.
 - **e.** In the Process Details dialog box, enter **OpenOpportunitiesByCreationDate** in the View Criteria Name field. This selects all revenue lines belonging to open opportunities that were created in the last 'X' days.
 - f. Enter BindOptyCreationDateFrom= followed by the date.

For example, if BindOptyCreationDateFrom=2014-01-01, then all open opportunities which were created between 1st January 2014 till the current date, are processed.

- g. Click Submit to schedule the process.
- h. In the Confirmation dialog box, make a note of the process identifier for monitoring the process, and click **OK**.
- i. Click Close.
- j. In the Schedule Processes page, click the **Refresh** icon.
- k. Review the status of the process job and verify if it has completed successfully.



- Note: Review a small subset of the open opportunities to confirm that the territory assignment is as expected.
- Running Batch Assignment Process for Sales Accounts
 - **a.** Ensure that the **ZCA_SA_AUTO_ASSIGN_ON_CREATE** and **ZCA_SA_AUTO_ASSIGN_ON_UPDATE** profile options are set to Yes in the **Manage Customer Center Profile Options** task.
 - b. From Navigator, click Customers.
 - c. In the Customers page, click Create Account.
 - d. In the Create Account page, enter a name and address of the sales account, and select the Address is sell to check box.
 - e. Click Save and Close.
 - f. From Navigator, click Customers.
 - g. In the Search pane, search for the name of the sales account you created and select it.
 - h. Under Customer Information, select Sales Account Team. The details of the sales account and territories associated with the sales account are displayed.

This indicates that the sales account was created successfully and the batch assignment was run automatically to assign the matching territories to the sales account.

To run the batch assignment process manually from the Scheduled Processes page, perform the following steps.

- a. From Navigator, click Scheduled Processes.
- b. In the Schedule Processes page, click Schedule New Process.
- c. In the Schedule New Process dialog box, search for the Request Sales Account Assignments process and select it.
- d. Click OK.
- Enter SalesAccount_Work_Object in the Work Object Code field and
 SalesAccountTerritory_Candidate_Object in the Candidate Object Code field.
- **f.** Select **Territory** in the Assignment Mode list.
- g. Enter AllSalesAccountsVC in the View Criteria Name field. This selects all sales accounts.
- h. Click **Submit** to schedule the process.
- i. In the Confirmation dialog box, make a note of the process identifier for monitoring the process, and click **OK**.
- j. Click Close.
- **k.** In the Schedule Processes page, click the **Refresh** icon.
- I. Review the status of the process job and verify if it has completed successfully.
 - Note: Review a small subset of the accounts to confirm that the territory assignment is as expected.

Related Topics

Managing Territory Geographies: Worked Example



Importing Geographies Using File-Based Import: Explained

This topic explains how to prepare and import geography data from an external data source using the File-Based Data Import feature. A geography is any region with a boundary around it, regardless of its size. It might be a state, a country, a city, a country, or a ward. You must create or import geographies before you can associate them with custom zones and addresses.

Note: The application ships with third-party (Nokia) master geography data for multiple countries that can be easily imported. You can import Oracle-licensed Nokia data from Navteq, for those countries where the data is available, such as the U.S. You can import Nokia Geography data using the Manage Geographies task. Search for the country, and select Import Nokia Data from the Actions menu. If the licensed Navteq data is not available for a particular country, then the Import Nokia Data action is disabled. For more information, see Replacing Existing Master Geography Data with Revised Nokia Geography Data: Procedure. If Nokia geography data is not available for a country, then use the information in this chapter to import it using File-Based Data Import.

Consider the following questions when importing your data:

- How does your legacy system or source system represent the geography data compared to how Oracle applications represent the same data?
- Do you have to configure values in the application to map to your data values?
- What import features are available for importing your business object?
- How do you verify your imported data?

Comparing Business Object Structures

You must understand how your geography data corresponds with the data in the application so that you can map your legacy data to the data that the application requires. First, you must understand how the application represents the structure of the data for a geography.

You must import a separate country structure import object for each country. Each of these import objects must contain the geography types that are used in the country's structure, organized in a hierarchy using geography level numbers. For example, if you are importing the country structure of Australia, the country structure could be the following: 1: Country, 2: State, 3: County, 4: Town, 5: ZIP.

Import Objects for the Geography

To facilitate importing geographies, the application incorporates the structure of the geography into import objects. The import object for the geography is ImpGeography.

Comparing Business Object Data

Each import object is a collection of attributes that helps to map your data to the application data and to support one-to-many relationships between the structural components that make up the geography.

You must understand the attribute details of the import objects so that you can prepare your import data. You can use reference guide files that contain attribute descriptions, values that populate attributes by default when you do not provide values, and validation information for each import object attribute. The validation information includes the navigation path to the task where you can define values in the application. For example, if you have values in your data that correlate to a choice list in the application, then the validation information for that attribute provides the task name in the Setup and Maintenance



work area where you can define your values. For additional information, including a list of reference guide file names and locations that you need to complete this task, see the following table.

Import Object	Related Import Object Topic
ImpGeography	Geography Import Objects: How They Work Together



You can use the keyword importing geographies to search for related topics in Help.

Extensible Attributes

The application doesn't support extensible attributes for geographies. You can import only data for geography object that already exist by default in the application.

Importing Geographies Using File-Based Data Import

For the geography business object, you must use the File-Based Data Import feature. You prepare XML or text source data files in a form that is suitable for a file-based import. The file-based import process reads the data in your source file, populates the interface tables according to your mapping, and imports the data into the application destination tables.

The Define File-Based Data Import Setup and Maintenance task list includes the tasks that are required to configure the import objects, to create source-file mappings, and to schedule the import activities. You submit file-based import activities for each import object. When you're creating a new geography, you import the Geography object. You must be assigned the Master Data Management Administrator job role to access and submit the import activities for geographies.

When importing geography information, you must provide the parent reference information for all parent levels for the entity.

Verifying Your Imported Data

Oracle applications provide File-Based Import activity reports, which you can use to verify imported data. Users with the Master Data Management Administrator job role can also navigate to the Manage Geographies work area to view the imported geographies.

Related Topics

- File-Based Data Import: How It Works
- Getting Started with File-Based Import: Documentation Overview

Geography Import Objects: How They Work Together

This topic describes the Geography import object. You use the Geography import object to import geography information.

This topic introduces the following:

- · Target objects for the Geography import object
- Target import object attributes



Reference guide files for target import object attributes

Geography Target Import Objects

You can use the Geography import object to import geography hierarchy information to create or update the geography data of a country. To map the source data in your import file to the target attributes in the application, you must understand how the target objects are related and what attributes are included in each target object.

The target import objects in the Geography import object contain information about the geography hierarchy. When updating an existing geography, you must provide the parent reference information of the existing geography, which connects the geography to the country of which it is a part.

Use the ImpGeography target import object to create and update geography information.

Note: Before you import geography data for a country, you must define the country's geography structure.

Target Import Object Attributes

You must compare the attributes that you want to import with the target object attributes that are available and with their valid values. To evaluate your source data and Oracle Sales Cloud attributes for mapping and validation, you use a reference file. See the File Based Data Import for Oracle Sales Cloud guide available on the Oracle Sales Cloud Help Center (https://docs.oracle.com/cloud/latest/salescs_gs/docs.htm). In the File Based Data Imports chapter, see the topic for your import object of interest, which includes links to reference files for target import objects. A reference guide file includes attribute descriptions, default values, and validations performed by the import process. Review the validation for each attribute to determine whether there are functional prerequisites or prerequisite setup tasks that are required.

To import your source file data, you define a mapping between your source file data and the combination of the target object and target object attribute. You can predefine and manage import mappings using the Manage File Import Mappings task, or you can define the mapping when you define the import activity using the Manage File Import Activities task. Both tasks are available in the Setup and Maintenance work area.

Note: If any of the attributes you want to import do not have an equivalent target object attribute, then review the Application Composer extensibility features for geography.

Reference Files for Target Import Object Attributes

To access the reference guide files for the geography's target import objects, see the File Based Data Import for Oracle Sales Cloud guide available on the Oracle Sales Cloud Help Center (https://docs.oracle.com/cloud/latest/salescs_gs/docs.htm). In the File Based Data Imports chapter, see the topic for your import object of interest, which includes links to reference files for target import objects. For detailed information on importing geographies using file-based import, refer to Document No. 1481758.1, Importing Master Reference Geography Data, on the Oracle Support site.

The following table lists the reference files that are available by target import object.

Target Import Object	Description	Attribute Reference Guide File Names
ImpGeography	Contains information that captures a country's geography hierarchy details, such as geography type, geography code, etc.	HZ_IMP_GEOGRAPHIES_T_Reference



Related Topics

- File-Based Data Import: How It Works
- Getting Started with File-Based Import: Documentation Overview

Importing Geographies Using File-Based Data Import: Worked Example

This example demonstrates how to import data using the File-Based Data Import tool. In this example, you have a source file containing geography data that you want to import into the application so that the geography data can be used for real time address validation and tax purposes.

The following table summarizes the key decisions that you must make in this scenario.

Decisions to Consider	In This Example
What type of object are you importing?	Geography
What file type are you using for your source data?	Text file
Where are you uploading your source data file from?	Your desktop
What data type is your source data file?	Comma separated
Which fields are you importing into the application?	All, except for the RecordTypeCode field
When do you want to process the import?	Immediately

Summary of the Tasks

You perform the following steps to create an import activity and activate the import:

- 1. Determining what information is in the source file.
- 2. Creating and scheduling the import activity.
- 3. Monitoring the import results.

Prerequisites for Importing Additional Geography Data After Your Initial Import

1. Ensure that the combination of the Source ID and Parent Source ID values is unique for each row of data within a single import. However, your source data files don't need to have the same Source ID and Parent Source ID values



- as your previously imported geography data. If the geography structure levels and the parents for each geography value are the same, then the changed IDs will not affect the import.
- 2. Ensure that all the parents of a child geography are included in your data file so that the child geography can be added. For example, if you originally imported US, CA, and San Francisco, and now you want to import the city of San Jose in CA, then your data file must include US, CA, and San Jose.
- 3. Check that your source data file has the correct values for the geography data that you have already loaded. For example, if your initial import included the value US for country and CA as state, and in a subsequent import you have California as a state, then your geography import creates two state records (CA and California) in the application data, with the US as the country parent.

Determining What Information is in the Source File

- 1. The source geography data files must include a unique Source ID value for each row of data and Parent Source ID value for the parent of that row of data. The Source or Parent Source IDs should not be longer than 18 characters.
- 2. You can structure your geography source data as follows:

Geography Level	Name	Source ID	Parent Source ID
1 (Country)	US	1	
2 (State)	CA	11	1
3 (County)	Alameda	111	11
4 (City)	Pleasanton	1111	111
4 (City)	Dublin	1112	111

Creating and Scheduling the Import Activity

You can create an import activity, enter the import details, and schedule the import. An import activity includes selecting the source file or file location, mapping the source file to the database, and scheduling the import.

- 1. In the Setup and Maintenance work area, search for the Manage File Import Activities task. Click Go to Task.
- 2. In the Manage Import Activities page, click **Create**.
- 3. In the Create Import Activity: Map Fields page, map each field from your source file to the target object and attribute, as shown in the following table.

Field	Value
Name	Master Reference Geographies
Object	Geography
File Type	Text File



Field	Value
File Selection	Specific file
Upload From	Desktop
File Name	Choose relevant file from desktop
Data Type	Comma separated

- Note: Ensure that the file type that you select in the Create Import Activity: Set Up page matches the file type of the source data file.
- 4. Click Next.
- 5. In the Create Import Activity: Map Fields page, map each field from your source file to the Oracle Sales Cloud database object and attribute, as shown in the following table.

Column Header	Example Value	Ignore	Object	Attribute
Primary Geography Name	Primary Geography Name	United States	Imp Geography	Primary Geography Name
Country Code	US	No	Imp Geography	Country Code
Record Type Code	0	Yes	Imp Geography	Record Type Code
Source ID	10265	No	Imp Geography	Source ID
Parent Source ID	1053	No	Imp Geography	Parent Source ID

If you don't want to import a column in the text file, then you can select **Ignore**.

- Note: If you can't map the fields from your source file to the relevant target object, then see the import object spreadsheets.
- 6. Click Next.
- 7. In the Create Import Activity: Create Schedule page, select **Immediate** in the Schedule field so that the import will start as soon as you activate it.
 - Instead of immediately importing the data, you can choose a date and time to start the import. You can also specify whether the import will be repeated and the frequency of the repeated import.
- 8. Click Next.



Monitoring the Import Results

You can monitor the processing of the import activity and view the completion reports for both successful records and errors.

- 1. In the Create Import Activity: Review and Activate page, verify your import details in the Import Details, File Details, Import Options, and Schedule sections. Update the import details if required by navigating to the previous screens using the **Back** link.
- Confirm your import details, and click **Activate** to submit the import.After the import activity has finished, the Status field value changes to Completed.

Related Topics

• File-Based Import Processing: How it Works

Importing Country Structures Using File-Based Import: Explained

This topic explains how to prepare and import country structure data from an external data source using the File-Based Data Import feature. A country structure is a hierarchical grouping of geography types for a country. For example, the geography structure for the United States has the geography type of State at the top, followed by the County, then the City, and finally the Postal Code.

You can use the country structure to set up the following:

- The relationships between geographies within a country
- The types of geographies that you can define for a country

Consider the following questions when importing your data:

- How does your legacy system or source system represent the geography data compared to how the application represents the same data?
- Do you have to configure values in the application to map to your data values?
- Do you have to customize the application to capture additional attributes that are critical to the way you do business?
- What import features are available for importing your business object?
- How do you verify your imported data?

Comparing Business Object Structures

You must understand how your country structure data corresponds with the data in the application so that you can map your legacy data to the data that the application requires. First, you must understand how the application represents the structure of the data for a country structure.

You must import a separate country structure import object for each country. Each of these import objects must contain the geography types that are used in the country's structure, organized in a hierarchy using geography level numbers. For example, if you're importing the country structure of Australia, the country structure could be the following: 1: Country, 2: State, 3: County, 4: Town, 5: ZIP.



Import Objects for the Country Structure

To facilitate importing country structures, the application incorporates the structure of the country structure into import objects. The import object for country structures is GeoStructureLevel.

Comparing Business Object Data

Each import object is a collection of attributes that helps to map your data to the application data and to support one-to-many relationships between the structural components that make up the country structure.

You must understand the attribute details of the import objects so that you can prepare your import data. You can use reference guide files that contain attribute descriptions, values that populate attributes by default when you don't provide values, and validation information for each attribute. The validation information includes the navigation path to the task where you can define values in the application. For example, if you have values in your data that correlate to a choice list in the application, then the validation information for that attribute provides the task name in the Setup and Maintenance work area where you can define your values. For additional information, including a list of reference guide file names and locations that you need to complete this task, see the following table.

Import Object	Related Import Object Topic
Country Structure	Country Structure Import Objects: How They Work Together

Extensible Attributes

If you need to extend the application object to import your legacy or source data, you must use Application Composer to design your object model extensions and to generate the required artifacts to register your extensions and make them available for importing. The corresponding import object is updated with the extensible attributes, which can then be mapped to your source file data. You can use the same source file to import both extensible custom attributes and the standard import object attributes.

Importing Country Structures Using File-Based Data Import

For the country structure business object, you must use the File-Based Data Import feature. You prepare XML or text source data files in a form that is suitable for a file-based import. The file-based import process reads the data in your source file, populates the interface tables according to your mapping, and imports the data into the application destination tables.

The Define File-Based Data Import Setup and Maintenance task list includes the tasks that are required to configure the import objects, to create source-file mappings, and to schedule the import activities. You submit file-based import activities for each import object. When you're creating a new country structure, you import the Country Structure object. You must be assigned the Master Data Management Administrator job role to access and submit the import activities for country structures.

Verifying Your Imported Data

You can view the list of import activities from the Manage Import Activities page. You can verify your imported data by clicking the Status column for your import activity.

Related Topics

• File-Based Data Import: How It Works



- Getting Started with File-Based Import: Documentation Overview
- Extending Oracle Sales Cloud: How It Works

Country Structure Import Objects: How They Work Together

This topic describes the Country Structure import object. You use the Country Structure import object when you submit a file-based import activity to import your country structure information. This topic introduces the following:

- Target objects for the Country Structure import object
- Target import object attributes
- Reference guide files for target import object attributes

Country Structure Target Import Objects

The Country Structure import object contains one target import object. The target import object organizes the individual attributes of the different aspects of the geography structure. When updating an existing country structure, you must provide the parent reference information of the existing country structure. This reference information connects the imported geography structure to the existing one. Use the ImpGeoStructureLevel target import object to create and update country structure information.

Target Import Object Attributes

You must compare the attributes that you want to import with the target object attributes that are available and with their valid values. To evaluate your source data and Oracle Sales Cloud attributes for mapping and validation, you use a reference file. See the File Based Data Import for Oracle Sales Cloud guide available on the Oracle Sales Cloud Help Center (https://docs.oracle.com/cloud/latest/salescs_gs/docs.htm). In the File Based Data Imports chapter, see the topic for your import object of interest, which includes links to reference files for target import objects. A reference guide file includes attribute descriptions, default values, and validations performed by the import process. Review the validation for each attribute to determine whether there are functional prerequisites or prerequisite setup tasks that are required.

To import your source file data, you define a mapping between your source file data and the combination of the target object and target object attribute. You can predefine and manage import mappings using the Manage File Import Mappings task, or you can define the mapping when you define the import activity using the Manage File Import Activities task. Both tasks are available in the Setup and Maintenance work area.

Note: If any of the attributes you want to import does not have an equivalent target object attribute, then review the Application Composer extensibility features for country structures.

Reference Files for Target Import Object Attributes

To access reference files for this object's target import objects, see the File Based Data Import for Oracle Sales Cloud guide available on the Oracle Sales Cloud Help Center (https://docs.oracle.com/cloud/latest/salescs_gs/docs.htm). In the File Based Data Imports chapter, see the topic for your import object of interest, which includes links to reference files for target import objects.



For detailed information on importing geographies using file-based import, refer to Document No. 1481758.1, Importing Master Reference Geography Data, on the Oracle Support site.

The following table lists the reference files that are available by target import object.

Target Import Object	Description	Reference Guide File Names
ImpGeoStructureLevel	Information that specifies a country's geography structure.	HZ_IMP_GEO_STRUCTURE _ LEVELS_ Reference

Related Topics

- File-Based Data Import: How It Works
- Getting Started with File-Based Import: Documentation Overview
- Importing Country Structures Using File-Based Import: Quick Start
- Extending Oracle Sales Cloud: How It Works

Importing and Exporting Territory Geography Zones: Explained

Territory geography zones are geographical boundaries that you can set up to replicate your organization's regions, such as a Pacific Northwest sales region. You can set up territory geography zones in one application instance, and then after the territory geography zones are defined you can export the territory zones and import them into another application instance.

To define your territory geography zones and then import your territory zones into another application instance, you must complete the following steps:

- 1. Import the master reference geography data into the application.
- 2. Define your territory geography zones using the Manage Territory Geographies task.
- 3. Export the territory geography zones.
- **4.** Import the territory geography zones into another application instance.

Import the master reference geography data

Firstly, you need to import the master reference geography data. Master reference geography data consists of geography elements such as country, state, and city, and is required for any geographical information you store in the application, such as address information used in customer and sales records. For more information, refer to the Geography Hierarchy: Explained topic listed in the related topics section. Master reference geography data can be imported into the application using the Manage File Import Activities task in Setup and Maintenance - refer to the Importing Master Reference Geography Data: Worked Example topic listed in the related topics section for more information.

Define your territory geography zones

Once the master reference geography data has been imported, you can then create your territory geography zones in the application using the Manage Territory Geographies task in Setup and Maintenance. For more information, refer to the Managing Territory Geographies: Worked Example topic listed in the related topics section.



Export the territory geography zones

Once you have completed importing the master reference geography data and defining your territory geography zone tasks, you can create a configuration package to export the territory zone data. For more information, refer to the Exporting Setup Data demo listed in the related topics section.

Import the territory geography zones

Once you have downloaded your configuration package for your territory geography zone setup, you can import the territory zones into another application instance. For more information, refer to the Importing Setup Data listed in the related topics section.

Note: Ensure that you import your master reference geography data into the new application instance before you import the configuration package.

Related Topics

Managing Territory Geographies: Worked Example

Defining Address Cleansing: Explained

Address cleansing validates, corrects, and standardizes address information that you enter in the application. Address cleansing, unlike geography validation, validates both the geography attributes and the address line attributes.

To use the address cleansing functionality, you need to have license for the customer data quality application, because the feature is delivered using data quality integration.

You can specify the real-time address cleansing level for each country by choosing either of these options:

- None: Specifies no real time address cleansing.
- Optional: Provides option to cleanse addresses.

Once you have enabled address cleansing for a country, a **Verify Address** icon appears at address entry points in the application. Click the icon to perform address cleansing and receive a corrected, standardized address. If the application does not find a matching address, then an alert message is displayed.

FAQs for Geographies

When do I define address cleansing?

When address data entered into the application needs to conform to a particular format, in order to achieve consistency in the representation of addresses. For example, making sure that the incoming data is stored following the correct postal address format.



Why can't I update a geography structure by copying an existing country structure?

You can only update a geography structure by adding existing geography types, or by creating new geography types and then adding them to the geography structure. You can only copy an existing country structure when you are defining a new country structure.

Why can't I delete a level of the country geography structure?

If a geography exists for a country geography structure level then you cannot delete the level. For example, if a state geography has been created for the United States country geography structure, then the State level cannot be deleted in the country geography structure.

Can I add any geography to the geography hierarchy?

Yes. However, the geography type for the geography that you want to add must be already added to the country geography structure.

Can I edit a specific geography in the geography hierarchy?

Yes. In the Manage Geography Hierarchy page you can edit details such as the geography's date range, primary and alternate names and codes, and parent geographies.

How can I add a geography that is the level below another geography in a geography hierarchy?

Select the geography that you want your geography to be created below, and then click the **Create** icon. This will allow you to create a geography for a geography type that is the level below the geography type you selected. The structure of the country's geography types are defined in the Manage Geography Structure page.



4 Currencies and Currency Rates

Manage Currencies

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.

FAQs for Manage Currencies



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.

Manage Conversion Rate Types

Creating Conversion Rate Types: Critical Choices

Maintain different conversion rates between currencies for the same period with the Oracle Fusion General Ledger conversion rate types functionality. Four predefined daily conversion rate types are seeded:

- Spot
- Corporate
- User
- Fixed

You can use different rate types for different business needs. During journal entry, the conversion rate is provided automatically by the General Ledger based on the selected conversion rate type and currency, unless the rate type is user. For user rate types, you must enter the conversion rate. Define additional rate types as needed. Set your most frequently used rate type as the default. Conversion rate types cannot be deleted.



Assign conversion rate types to automatically populate the associated rate for your period average and period end rates for the ledger. For example, you can assign the predefined rate type **Spot** to populate your period average rates and the predefined rate type **Corporate** to populate your period end rates. Period average and period end rates are used in translation of account balances.

Conversion rate types are used to automatically assign a rate when you perform the following accounting functions:

- Convert foreign currency journal amounts to ledger currency equivalents.
- Convert journal amounts from source ledgers to reporting currencies or secondary ledgers.
- Run Revaluation or Translation processes.

In creating new conversion rates, decide whether to do the following:

- Enforce inverse relationships
- Select pivot currencies
- Select contra currencies
- Enable cross rates and allow cross rate overrides
- Maintain cross rate rules

Enforce Inverse Relationships

Select the **Enforce Inverse Relationship** option to specify whether or not to enforce the automatic calculation of inverse conversion rates when defining daily rates.

Action	Results
Selected	When you enter a daily rate to convert currency A to currency B, General Ledger automatically calculates the inverse rate, currency B to A, and enters it in the adjacent column. If either rate is changed, the application automatically recalculates the other rate.
	You can update the application calculated inverse rate, but once you do, the related rate is updated. The check box enforces that the inverse relationship is maintained but does not prevent you from updating the rates.
Not Selected	General Ledger calculates the inverse rate but you can change the rate and update the daily rates table without the corresponding rate being updated.

Select Pivot Currencies

Select a pivot currency that is commonly used in your currency conversions. A pivot currency is the central currency that interacts with contra currencies. For example, you set up a daily rate between the US dollar (USD) and the Euro currency (EUR) and another between the USD and the Canadian dollar (CAD). USD is the pivot currency in creating a rate between EUR and CAD. EUR and CAD are the contra currencies. Select the pivot currency from the list of values which contains those currencies that are enabled, effective, and not a statistical (STAT) currency. The description of the pivot currency is populated automatically based on the currency definition.

If you want the application to create cross rates against a base currency, define the base currency as the pivot currency. Selected pivot currencies can be changed in the Rate Types page.

Select Contra Currencies

Select currencies available on the list of values as contra currencies. The available currencies are those currencies which are enabled, effective, not STAT currency, and not the pivot currency selected earlier. The description of the contra currency is



populated automatically based on the currency definition. Add or delete contra currencies in the Contra Currencies region of the Rate Types page.

Enable Cross Rates and Allow Cross Rate Overrides

Check the **Enable Cross Rates** check box to calculate conversion rates based on defined currency rate relationships. General Ledger calculates cross rates based on your defined cross rate rules. Associate your cross rate rules with a conversion rate type, pivot currency, and contra currencies. Cross rates facilitate the creation of daily rates by automatically creating the rates between contra currencies based on their relationship to a pivot currency. If the **Enable Cross Rates** check box is changed to unchecked after entering contra currencies, the application stops calculating cross rates going forward for that particular rate type. All the earlier calculated cross rates for that rate type remain in the database unless you manually delete them.

For example, if you have daily rates defined for the pivot currency, USD to the contra currency, EUR, and USD to another contra currency, CAD, the application will automatically create the rates between EUR to CAD and CAD to EUR. This prevents the need to manually define the EUR to CAD and CAD to EUR rates.

Check the **Allow Cross Rates Override** check box to permit your users to override application generated cross rates. If you accept the default of unchecked, the application generated cross rates cannot be overridden

Maintain Cross Rate Rules

Define or update your cross rate rules at any time by adding or removing contra currency assignments. Add a contra currency to a cross rate rule and run the Daily Rates Import and Calculation process to generate the new rates. If your remove a cross rate rule or a contra currency from a rule, any cross rates generated previously for that contra currency remain unless you manually delete them. Changes to the rule are not retroactive and will not affect previously stored cross rates. The Cross Rate process generates as many rates as possible and skips currencies where one component of the set is missing.

Note: With a defined web service that extracts daily currency conversion rates from external services, for example Reuters, currency conversion rates are automatically updated for the daily rates and all cross currency relationships.

Related Topics

What's the difference between calendar and fiscal period naming?

Using Rate Types: Examples

The four predefined conversion rate types in Oracle Fusion Applications are:

- Spot
- Corporate
- User
- Fixed

Scenario

You are the general ledger accountant for Vision US Inc. You are entering a journal entry to capture three transactions that were transacted in three different foreign currencies:

Canadian dollar (CAD): A stable currency



- Mexican Peso (MXP): A fluctuating currency
- · Hong Kong dollar (HKD): An infrequently used currency

You enter two lines with accounts and amounts for each foreign currency transaction. Based on your company procedures, you select the rate type to populate the rate for **Corporate** and **Spot** rate types from your daily rates table. You manually enter the current rate for the **User** rate type.

Currency Selected	Rate Type Selected	Reason
CAD	Corporate	Entered a periodic type of transaction. Your company has established a daily rate to use for the entire month across divisions for all transactions in CAD. CAD is a stable currency that only fluctuations slightly over the month.
MXP	Spot	Entered a periodic type of transaction. Your company enters daily rates each day for MXP because this currency is unstable and fluctuates.
HKD	User	Entered a one time transaction. Your company does not maintain daily rates in HKD.

Your company does not currently use the **Fixed** rate type. From January 1, 1999, the conversion rate of the French franc (FRF) against the Euro (EUR) was a fixed rate of 1 EUR to 6.55957 FRF. Your French operations were started in 2007, so you maintain all your French business records in the EUR.

FAQs for Manage Conversion Rate Types

What's the difference between spot, corporate, user, and fixed rate types?

Spot, corporate, user, and fixed conversion rate types differ based on fluctuations of your entered foreign currency and your company procedures for maintaining daily rates.

Rate Type	Usage
Spot	For currencies with fluctuating conversion rates or when exact currency conversion is needed.
Corporate	For setting a standard rate across your organization for a stable currency.
User	For infrequent entries where your daily rates for the entered foreign currency are not set up.
Fixed	For rates where the conversion is constant between two currencies.



If you have infrequent foreign currency transactions, the user rate type can simplify your currency maintenance. The user rate can also provide an accurate conversion rate on the date of the transaction.

Manage Daily Rates

Entering Daily Rates Manually: Worked Example

You are required to enter the daily rates for currency conversion from Great Britain pounds sterling (GBP) to United States dollars (USD) for 5 days for your company InFusion America Inc.

In order to load rates using the Daily Rates Spreadsheet, you need to install Oracle ADF Desktop Integration client software. Oracle ADF Desktop Integration is an Excel add-in that enables desktop integration with Microsoft Excel workbooks. Users can download the installation files from **Navigator > Tools > Download Desktop Integrator Installer.**

Entering Daily Rates

1. Navigator > Period Close.

Use the **Period Close** work area to link to close processes and currency process.

2. Click the Manage Currency Rates link.

Use the **Currency Rates Manager** page to create, edit, and review currency rate types, daily rates, and historical rates.

3. Click the **Daily Rates** tab.

Use the **Daily Rates** tab to review and enter currency rates.

4. Click the Create in Spreadsheet button.

Use the Create Daily Rates spreadsheet to enter daily rates in a template that you can save and reuse.

- 5. Click in the From Currency field. Select the GBP Pound Sterling list item.
- **6.** Click in the **To Currency** field. Select the USD US Dollar list item.
- 7. Click in the Conversion Rate field. Select the Spot list item
- 8. Click in the **From Conversion** field. Enter a valid value: 10/1/2014.
- 9. Click in the **To Conversion Date** field. Enter a valid value: 10/5/2014.
- **10.** Click in the **Conversion Rate** field. Enter a valid value: 1.6.
- **11.** Click the **Submit** > **OK** twice.
- 12. Review the **Record Status** column to verify that all rows were loaded successfully.
- 13. Save template to use to enter daily rates frequently. You can save the spreadsheet to either a local drive or a shared network drive.
- 14. Optionally, edit the rates from the Daily Rates user interface or resubmit the spreadsheet.

Related Topics

Using Desktop Integrated Excel Workbooks: Points to Consider

Updating Currency Rates: Worked Example

You are required to change today's daily rates that were already entered. The rates you are changing are for currency conversion from Great Britain pounds sterling (GBP) to United States dollars (USD) for your company InFusion America.



Currency conversion rates were entered by an automatic load to the Daily Rates table. They can also be entered through a spreadsheet.

Updating Currency Rates

1. Navigate to the Period Close work area.

Use the Period Close work area to link to close processes and currency process.

2. Click the Manage Currency Rates link.

Use the Currency Rates Manager page to create, edit, and review currency rate types, daily rates, and historical rates.

3. Click the Daily Rates tab.

Use the Daily Rates tab to review and enter currency rates.

- 4. Click the From Currency list. Select the GBP Pound Sterling list item.
- 5. Click the To Currency list. Select the USD US Dollar list item.
- 6. Enter the dates for the daily rates that you are changing. Enter today's date.
- 7. Click the Rate Type list. Select the Spot list item.
- 8. Click the Search button.
- 9. Click in the Rate field. Enter the new rate of 1.7 in the Rate field.
- 10. Click in the Inverse Rate field. Enter the new inverse rate of 0.58822 in the Inverse Rate field.
- 11. Click the Save button.

Related Topics

Using Desktop Integrated Excel Workbooks: Points to Consider





5 Enterprise Structures: Initial Configuration

Enterprise Structures: Overview

Oracle Fusion Applications have been designed to ensure your enterprise can be modeled to meet legal and management objectives. The decisions about your implementation of Oracle Fusion Applications are affected by your:

- Industry
- Business unit requirements for autonomy
- Business and accounting policies
- Business functions performed by business units and optionally, centralized in shared service centers
- · Locations of facilities

Every enterprise has three fundamental structures, that describe its operations and provide a basis for reporting.

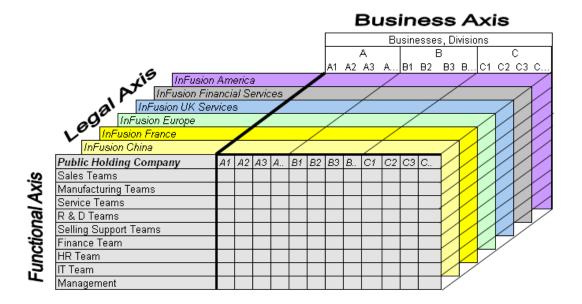
- Legal
- Managerial
- Functional

In Oracle Fusion, these structures are implemented using the chart of accounts and organization hierarchies. Many alternative hierarchies can be implemented and used for reporting. You are likely to have one primary structure that organizes your business into:

- Divisions
- Business Units
- Departments



Aligned these structures with your strategic objectives.



Legal Structure

The figure above shows a typical group of legal entities, operating various business and functional organizations. Your ability to buy and sell, own, and employ comes from your charter in the legal system. A corporation is:

- A distinct legal entity from its owners and managers.
- Owned by its shareholders, who may be individuals or other corporations.

Many other kinds of legal entities exist, such as sole proprietorships, partnerships, and government agencies.

A legally recognized entity can own and trade assets and employ people in the jurisdiction in which the entity is registered. When granted these privileges, legal entities are also assigned responsibilities to:

- Account for themselves to the public through statutory and external reporting.
- Comply with legislation and regulations.
- Pay income and transaction taxes.
- Process value added tax (VAT) collection on behalf of the taxing authority.

Many large enterprises isolate risk and optimize taxes by incorporating subsidiaries. They create legal entities to facilitate legal compliance, segregate operations, optimize taxes, complete contractual relationships, and isolate risk. Enterprises use legal entities to establish their enterprise's identity under the laws of each country in which their enterprise operates.

In the figure above:

- A separate card represents a series of registered companies.
- Each company, including the public holding company, InFusion America, must be registered in the countries where they do business.



• Each company contributes to various divisions created for purposes of management reporting. These are shown as vertical columns on each card.

For example, a group might have a separate company for each business in the United States (US), but have its United Kingdom (UK) legal entity represent all businesses in that country.

The divisions are linked across the cards so that a business can appear on some or all of the cards. For example, the air quality monitoring systems business might be operated by the US, UK, and France companies. The list of business divisions is on the Business Axis.

Each company's card is also horizontally striped by functional groups, such as the sales team and the finance team. This functional list is called the Functional Axis. The overall image suggests that information might, at a minimum, be tracked by company, business, division, and function in a group environment. In Oracle Fusion Applications, the legal structure is implemented using legal entities.

Management Structure

Successfully managing multiple businesses requires that you segregate them by their strategic objectives, and measure their results. Although related to your legal structure, the business organizational hierarchies do not have to be reflected directly in the legal structure of the enterprise. The management structure can include divisions, subdivisions, lines of business, strategic business units, profit, and cost centers. In the figure above, the management structure is shown on the Business Axis. In Oracle Fusion Applications, the management structure is implemented using divisions and business units as well as being reflected in the chart of accounts.

Functional Structure

Straddling the legal and business organizations is a functional organization structured around people and their competencies. For example, sales, manufacturing, and service teams are functional organizations. This functional structure is represented by the Functional Axis in the figure above. You reflect the efforts and expenses of your functional organizations directly on the income statement. Organizations must manage and report revenues, cost of sales, and functional expenses such as research and development and selling, general, and administrative expenses. In Oracle Fusion Applications, the functional structure is implemented using departments and organizations, including sales, marketing, project, cost, and inventory organizations.

Global Enterprise Configuration: Points to Consider

Start your global enterprise structure configuration by discussing what your organization's reporting needs are and how to represent those needs in the Oracle Fusion Applications. The following are some questions and points to consider as you design your global enterprise structure in Oracle Fusion.

- Enterprise Configuration
- Business Unit Management
- Security Structure
- Compliance Requirements



Enterprise Configuration

- What is the level of configuration needed to achieve the reporting and accounting requirements?
- What components of your enterprise do you need to report on separately?
- Which components can be represented by building a hierarchy of values to provide reporting at both detail and summary levels?
- Where are you on the spectrum of centralization versus decentralization?

Business Unit Management

- What reporting do I need by business unit?
- How can you set up your departments or business unit accounts to achieve departmental hierarchies that report accurately on your lines of business?
- What reporting do you need to support the managers of your business units, and the executives who measure them?
- How often are business unit results aggregated?
- What level of reporting detail is required across business units?

Security Structure

- · What level of security and access is allowed?
- Are business unit managers and the people that report to them secured to transactions within their own business unit?
- Are the transactions for their business unit largely performed by a corporate department or shared service center?

Compliance Requirements

- How do you comply with your corporate external reporting requirements and local statutory reporting requirements?
- Do you tend to prefer a corporate first or an autonomous local approach?
- Where are you on a spectrum of centralization, very centralized or decentralized?

Modeling Your Enterprise Management Structure in Oracle Fusion: Example

This example uses a fictitious global company to demonstrate the analysis that can occur during the enterprise structure configuration planning process.



Scenario

Your company, InFusion Corporation, is a multinational conglomerate that operates in the United States (US) and the United Kingdom (UK). InFusion has purchased an Oracle Fusion Enterprise Resource Planning (ERP) solution including Oracle Fusion General Ledger and all of the Oracle Fusion subledgers. You are chairing a committee to discuss creation of a model for your global enterprise structure including both your US and UK operations.

InFusion Corporation

InFusion Corporation has 400 plus employees and revenue of 120 million US dollars. Your product line includes all the components to build and maintain air quality monitoring (AQM) applications for homes and businesses. You have two distribution centers and three warehouses that share a common item master in the US and UK. Your financial services organization provides funding to your customers for the initial costs of these applications.

Analysis

The following are elements you must consider in creating your model for your global enterprise structure.

- Your company is required to report using US Generally Accepted Accounting Principles (GAAP) standards and UK Statements of Standard Accounting Practice and Financial Reporting Standards. How many ledgers do you want to achieve proper statutory reporting?
- Your managers need reports that show profit and loss (revenue and expenses) for their lines of business. Do you use business units and balancing segments to represent your divisions and businesses? Do you secure data by two segments in your chart of accounts which represents each department and legal entity? Or do you use one segment that represents both to produce useful, but confidential management reports?
- Your corporate management requires reports showing total organizational performance with drill-down capability to the supporting details. Do you need multiple balancing segment hierarchies to achieve proper rollup of balances for reporting requirements?
- Your company has all administrative, account payables, procurement, and Human Resources functions performed at their corporate headquarters. Do you need one or more business units in which to perform all these functions? How is your shared service center configured?

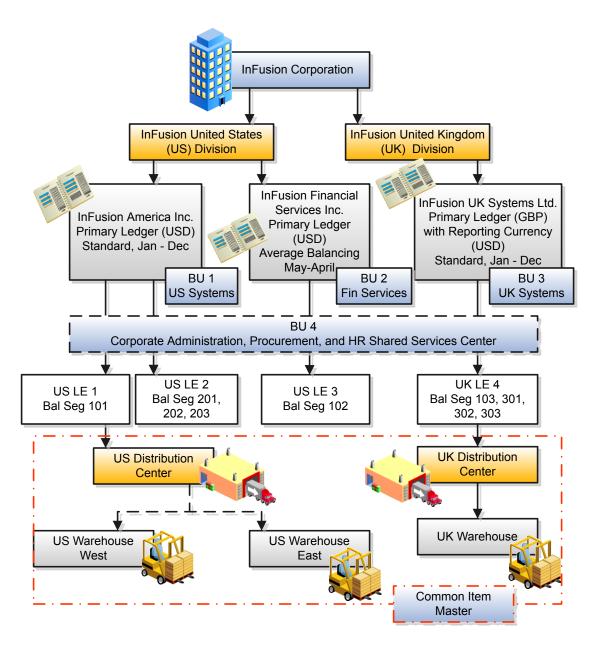
Global Enterprise Structure Model

The following figure and table summarize the model that your committee has designed and uses numeric values to provide a sample representation of your structure. The model includes the following recommendations:

- Creation of three separate ledgers representing your separate legal entities:
 - InFusion America Inc.
 - InFusion Financial Services Inc.
 - InFusion UK Services Ltd.



- Consolidation of results for application components, installations, and maintenance product lines across the enterprise
- All UK general and administrative costs processed at the UK headquarters
- US Systems' general and administrative costs processed at US Corporate headquarters
- US Financial Services maintains its own payables and receivables departments





Real World Entity	Entity Name	Enterprise	Legal Entity	BSV	Ledger	BU	Cost Center	Dept	In ventory Org
Enterprise	InFusion Group								
Company	USLE1		-						
Company	USLE2				_				
Company	USLE3								
Company	UK LE 4								
Bu siness Unit	U S Systems BU 1					•			
Bu siness Unit	FIN Services BU 2								
Bu siness Unit	UK Systems BU 3								
Division	In Fusion UK								
Division	InFusion U S								
Headquarters	BU 4								
Shared Service Center	BU 4								
Department	AP Department								
List of Items	Common Item Master								
Distribution Center	US Distribution Center								
Distribution Center	UK Distribution Center								
Warehouse	U S Warehouse West								
Warehouse	US Warehouse East								
Warehouse	UK Warehouse								
B SV = Balancing Segment Value									
BU = Business Unit									
Dept = Department									
Org = Organization									
= Mandatory Setup									
= Optional Setup									

In this chart, the green globe stands for required and gold globe stands for optional setup. The following statements expand on the data in the chart.

- The enterprise is required because it serves as an umbrella for the entire implementation. All organizations are created within an enterprise.
- Legal entities are also required. They can be optionally mapped to balancing segment values or represented by ledgers. Mapping balancing segment values to legal entities is required if you plan to use the intercompany functionality. The InFusion Corporation is a legal entity but is not discussed in this example.
- At least one ledger is required in an implementation in which you record your accounting transactions.
- Business units are also required because financial transactions are processed in business units.
- A shared service center is optional, but if used, must be a business unit.
- Divisions are optional and can be represented with a hierarchy of cost centers or by a second balancing segment value.
- Departments are required because they track your employees.
- Optionally, add an item master organization and inventory organizations if you are tracking your inventory transactions in Oracle Fusion Applications.



Note: Some Oracle Fusion Human Capital Management and Oracle Sales Cloud implementations do not require recording accounting transactions and therefore, do not require a ledger.

Designing an Enterprise Configuration: Example

This example illustrates how to set up an enterprise based on a global company operating mainly in the US and the UK with a single primary industry.

Scenario

InFusion Corporation is a multinational enterprise in the high technology industry with product lines that include all the components that are required to build and maintain air quality monitoring systems for homes and businesses. Its primary locations are in the US and the UK, but it has smaller outlets in France, Saudi Arabia, and the United Arab Emirates (UAE).

Enterprise Details

In the US, InFusion employs 400 people and has company revenue of 120 million US dollars.. Outside the US, InFusion employs 200 people and has revenue of 60 million US dollars.

Analysis

InFusion requires three divisions.

- The US division covers the US locations.
- The Europe division covers UK and France.
- Saudi Arabia and the UAE are covered by the Middle East division.

InFusion requires legal entities with legal employers, payroll statutory units, tax reporting units, and legislative data groups for the US, UK, France, Saudi Arabia, and UAE, to employ and pay its workers in those countries.

InFusion requires a number of departments across the enterprise for each area of business, such as sales and marketing, and a number of cost centers to track and report on the costs of those departments.

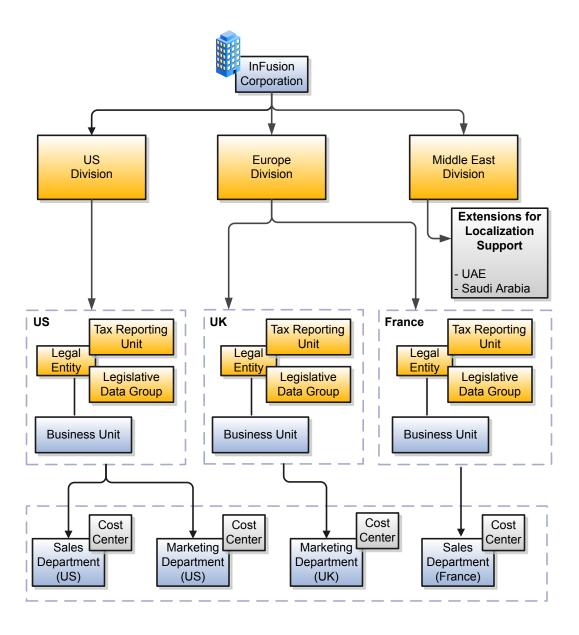
InFusion has general managers responsible for business units within each country. Those business units may share reference data. Some reference data can be defined within a reference data set that multiple business units may subscribe to. Business units are also required for financial purposes. Financial transactions are always processed within a business unit.

Resulting Enterprise Configuration

Based on this analysis, InFusion requires an enterprise with multiple divisions, ledgers, legal employers, payroll statutory units, tax reporting units, legislative data groups, departments, cost centers, and business units.



This figure illustrates the enterprise configuration that results from the analysis of InFusion Corporation.





Adding a New Division After Acquiring a Company: Example

This example describes how you can restructure your enterprise after acquiring a new division.

Scenario

You are part of a senior management team at InFusion Corporation. InFusion is a global company with organizations in the following countries:

- United States (US)
- United Kingdom (UK)
- France
- China
- Saudi Arabia
- United Arab Emirates (UAE)

The company's main area of business is in the high tech industry, and it recently acquired a new company. You must analyze the company's current enterprise structure and determine the new organizations to create in the new company.

Details of the Acquired Company

The acquired company is a Financial Services business based in Germany. The Financial Services business differs significantly from the high tech business. Therefore, you want to keep the Financial Services company as a separate business with all the costs and reporting managed by the Financial Services division.

Analysis

The following table summarizes the key decisions that you must consider when determining what new organizations to set up and how to structure the enterprise.

Decision to Consider	In This Example
Create location?	The Financial Services company and its departments are based in Frankfurt. Therefore, you only have to create one location.
Create separate division?	Yes. Although the new division will exist in the current enterprise structure, you want to keep the Financial Services company as a separate line of business. By creating a separate division, you can manage the costs and reporting separately from the InFusion Corporation. Additionally you don't have to modify any organizations in the enterprise setup.



Decision to Consider	In This Example			
Create business unit?	Yes. The Financial Services business requires you to create several jobs that don't exist in your high tech business. You can segregate the jobs that are specific to financial services in a new business unit.			
How many departments?	The Financial Services company currently has departments for sales, accounting, and marketing. As you have no plans to downsize or change the company, you can create three departments to retain the structure.			
How many cost centers?	Although you can have multiple cost centers to track the department costs, you decide to create one cost center for each department.			
How many legal entities?	Define a legal entity for each registered company or some other entity recognized by law. Using the legal entity, you can:			
	Record assets			
	Record liabilities			
	Record income			
	Pay transaction taxes			
	Perform intercompany trading			
	In this case, you only need one legal entity.			
	You must define the legal entity as a legal employer and payroll statutory unit. As the new division operates only from Germany, you can configure the legal entity to suit Germany's legal and statutory requirements.			
	Note: You can identify the legal entity as a payroll statutory unit. When you do so, the application transfers the legal reporting unit associated with the legal entity to Oracle Fusion HCM as a tax reporting unit.			
Create legislative data group?	Yes. Because you currently don't employ or pay people in Germany, you must create one legislative data group to run payroll for the workers in Germany.			

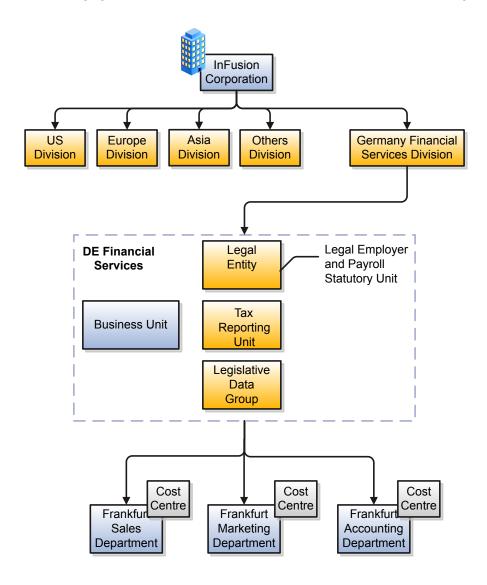
Resulting InFusion Enterprise Structure

Based on the analysis, you must create the following:

- One new division
- One new location
- Three new departments
- Three new cost centers
- One new legal entity
- One new legislative data group



The following figure illustrates the structure of InFusion Corporation after adding the new division and the other organizations.



Enterprise Structures Explained

Divisions: Explained

Managing multiple businesses requires that you segregate them by their strategic objectives and measure their results.



Responsibility to reach objectives can be delegated along the management structure. Although related to your legal structure, the business organizational hierarchies do not reflect directly the legal structure of the enterprise. The management entities and structure can include:

- Divisions and subdivisions
- Lines of business
- · Other strategic business units
- Their own revenue and cost centers

These organizations can be included in many alternative hierarchies and used for reporting, as long as they have representation in the chart of accounts.

Divisions

A division refers to a business-oriented subdivision within an enterprise, in which each division organizes itself differently to deliver products and services or address different markets. A division can operate in one or more countries, and can be many companies or parts of different companies that are represented by business units.

A division is a profit center or grouping of profit and cost centers, where the division manager is responsible for achieving business goals including profits. A division can be responsible for a share of the company's existing product lines or for a separate business. Managers of divisions may also have return on investment goals requiring tracking of the assets and liabilities of the division. The division manager generally reports to a top corporate executive.

By definition a division can be represented in the chart of accounts. Companies can use product lines, brands, or geographies as their divisions: their choice represents the primary organizing principle of the enterprise. This may coincide with the management segment used in segment reporting.

Oracle Fusion Applications supports a qualified management segment and recommends that you use this segment to represent your hierarchy of business units and divisions. If managers of divisions have return on investment goals, make the management segment a balancing segment. Oracle Fusion applications permit up to three balancing segments. The values of the management segment can be business units that roll up in a hierarchy to report by division.

Historically, divisions were implemented as a node in a hierarchy of segment values. For example, Oracle E-Business Suite has only one balancing segment, and often the division and legal entity are combined into a single segment where each value stands for both division and legal entity.

Use of Divisions in Oracle Fusion Human Capital Management (HCM)

Divisions are used in HCM to define the management organization hierarchy, using the generic organization hierarchy. This hierarchy can be used to create organization-based security profiles.

Legal 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.

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

Business Units and Reference Data Sets: How They Work Together

Reference data sharing enables you to group set-enabled reference data such as jobs or grades to share the data across different parts of the organization. Sets also enable you to filter reference data at the transaction level so that only data assigned to certain sets is available to be selected. To filter reference data, Oracle Fusion Human Capital Management (HCM), applications use the business unit on the transaction. To set up reference data sharing in Oracle Fusion HCM, you create business units and sets, and then assign the sets to the business units.

Common Set Versus Specific Sets

Some reference data in your organization may be considered global, and should therefore be made available for use within the entire enterprise. You can assign this type of data to the Common Set, which is a predefined set. Regardless of the business unit on a transaction, reference data assigned to the Common Set is always available, in addition to the reference data assigned to the set that corresponds to the business unit on the transaction.

Other types of reference data can be specific to certain business units, so you can restrict the use of the data to those business units. In this case, you can create sets specifically for this type of data, and assign the sets to the business units.

Business Unit Set Assignment

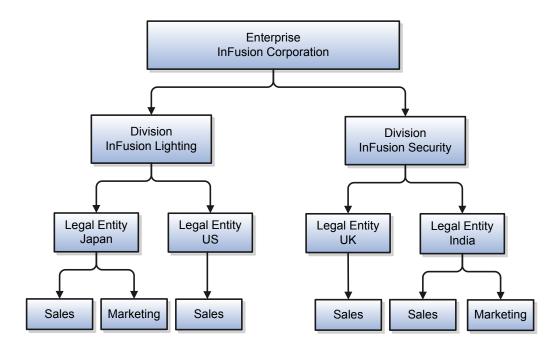
When you assign reference data sets to business units, you assign a default reference data set to use for all reference data types for that business unit. You can override the set assignment for one or more data types.

Example: Assigning Sets to Business Units

InFusion Corporation has two divisions: Lighting and Security, and the divisions each have two locations. Each location has one or more business functions.



The following figure illustrates the structure of InFusion Corporation.



When deciding how to create business units, InFusion decides to create them using the country and business function level. Therefore, they created the following business units:

- Sales_Japan
- Marketing Japan
- Sales_US
- Sales_UK
- Marketing_India
- Sales_India

Because locations, departments, and grades are specific to each business unit, InFusion does not want to share these types of reference data across business units. They create a reference data set for each business unit so that data of those types can be set up separately. Because the jobs in the Sales business function are the same across many locations, InFusion decides to create one additional set called Jobs. They override the set assignment for the Jobs reference data group and assign it to the Jobs set. Based on these requirements, they create the following sets:

- Sales_Japan_Set
- Mktg_Japan_Set
- Sales_US_Set
- Sales UK Set
- Mktg_India_Set
- Sales India Set
- Grades_Set

InFusion assigns business units to sets as follows:



Business Unit	Default Set Assignment	Set Assignment Overrides
Sales_Japan	Sales_ Japan_Set for grades, departments, and locations	Jobs set for jobs
Marketing_ Japan	Mktg_Japan_Set for grades, departments, and locations	None
Sales_US	Sales_US_Set for grades, departments, and locations	Jobs set for jobs
Sales_UK	Sales_UK_Set for grades, departments, and locations	Jobs set for jobs
Marketing_ India	Mktg_India_Set for grades, departments, and locations	None
Sales_India	Sales_ India_Set for grades, departments, and locations	Jobs set for jobs

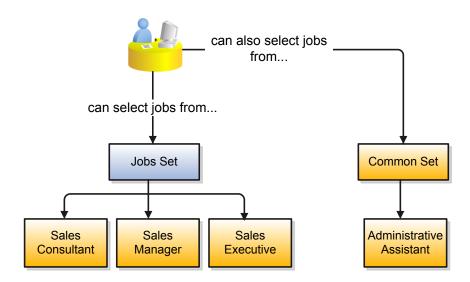
When setting up grades, departments, and locations for the business units, InFusion assigns the data to the default set for each business unit. When setting up jobs, they assign the Jobs set and assign the Common Set to any jobs that may be used throughout the entire organization.

When using grades, departments, and locations at the transaction level, users can select data from the set that corresponds to the business unit they enter on the transaction, and any data assigned to the Common Set. For example, for transactions for the Marketing_Japan business unit, grades, locations, and departments from the Mktg_Japan_Set is available to select, as well as from the Common Set.

When using jobs at the transaction level, users can select jobs from the Jobs set and from the Common Set when they enter a sales business unit on the transaction. For example, when a manager hires an employee for the Sales_India business unit, the list of jobs is filtered to show jobs from the Jobs and Common sets.

The following figure illustrates what sets of jobs can be accessed when a manager creates an assignment for a worker.





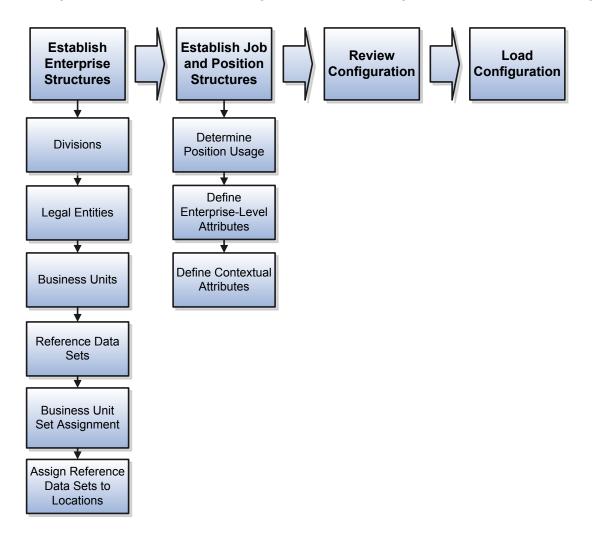
Enterprise Structures Configurator (ESC)

Establishing Enterprise Structures Using the Enterprise Structures Configurator: Explained

The Enterprise Structures Configurator is an interview-based tool that guides you through the process of setting up a basic enterprise structure. By answering questions about your enterprise, the tool creates a structure of divisions, legal entities, business units, and reference data sets that reflects your enterprise structure. After you create your enterprise structure, you also follow a guided process to determine whether to use positions, and whether to set up additional attributes for jobs and positions. After you define your enterprise structure and your job and position structures, you can review them, make any necessary changes, and then load the final configuration.



This figure illustrates the process to configure your enterprise using the Enterprise Structures Configurator.



To be able to use the Enterprise Structures Configurator, you must select the Enterprise Structures Guided Flow feature for your offerings on the Configure Offerings page in the Setup and Maintenance work area. If you don't select this feature, then you must set up your enterprise structure using individual tasks provided elsewhere in the offerings, and you can't create multiple configurations to compare different scenarios.

Establish Enterprise Structures

To define your enterprise structures, use the guided flow within the Establish Enterprise Structures task to enter basic information about your enterprise, such as the primary industry. You then create divisions, legal entities, business units, and reference data sets. The Establish Enterprise Structures task enables you to create multiple enterprise configurations so that you can compare different scenarios. Until you load a configuration, you can continue to create and edit multiple configurations until you arrive at one that best suits your enterprise.

Establish Job and Position Structures

You also use a guided process to determine whether you want to use jobs only, or jobs and positions. The primary industry that you select in the Establish Enterprise Structures task provides the application with enough information to make an initial recommendation. You can either accept the recommendation, or you can answer additional questions about how you



manage people in your enterprise, and then make a selection. After you select whether to use jobs or positions, you are prompted to set up a descriptive flexfield structure for jobs, and for positions if applicable. Descriptive flexfields enable you to get more information when you create jobs and positions.

Review Configuration

You can view a result of the interview process prior to loading the configuration. The review results, show the divisions, legal entities, business units, reference data sets, and the management reporting structure that the application will create when you load the configuration.

Load Configuration

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

Rolling Back an Enterprise Structure Configuration: Explained

The Enterprise Structures Configurator (ESC) provides the ability to roll back an enterprise configuration in the following circumstances:

Roll Back a Configuration Manually

You can manually roll back an enterprise configuration after loading it, for example, because you decide you do not want to use it. Clicking the Roll Back Configuration button on the Manage Enterprise Configuration page rolls back any enterprise structures that were created as a part of loading the configuration.

Roll Back a Configuration Automatically

If an error occurs during the process of loading the configuration, then the application automatically rolls back any enterprise structures that were created before the error was encountered.

Configuration Workbench: Explained

The Oracle Fusion Enterprise Structures Configurator (ESC) is an interview based tool to help you analyze how to represent your business in the Oracle Fusion Applications. The interview process poses questions about the name of your enterprise, legal structure, management reporting structure, and primary organizing principle for your business. Based on your answers, the applications suggest the best practices to use to implement business units in your enterprise. You can use or modify these answers to ensure that both your reporting and administrative goals are met in your Oracle Fusion deployment.

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

Use the Enterprise Structures Configurator (ESC), to create legal entities for your enterprise automatically, based on the countries in which divisions of your business operate, or you can upload a list of legal entities from a spreadsheet.



Automatically Creating Legal Entities

If you are not certain of the number of legal entities that you need, you can create them automatically. To use this option, you first identify all of the countries in which your enterprise operates. The application opens the Map Divisions by Country page, which contains a matrix of the countries that you identified, your enterprise, and the divisions that you created. You select the check boxes where your enterprise and divisions intersect with the countries to identify the legal entities that you want the application to create. The enterprise is included for situations where your enterprise operates in a country, acts on behalf of several divisions within the enterprise, and is a legal employer in a country. If you select the enterprise for a country, the application creates a country holding company.

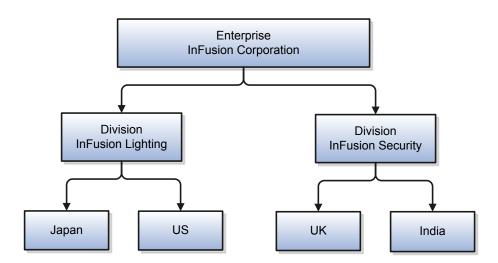
The application automatically creates the legal entities that you select, and identifies them as payroll statutory units and legal employers. For each country that you indicated that your enterprise operates in, and for each country that you created a location for, the application also automatically creates a legislative data group.

Any legal entities that you create automatically cannot be deleted from the Create Legal Entities page within the Enterprise Structures Configurator. You must return to the Map Divisions by Country page and deselect the legal entities that you no longer want.

Example: Creating Legal Entities Automatically

InFusion Corporation is using the ESC to set up its enterprise structure. The corporation has identified two divisions, one for Lighting, and one for Security. The Lighting division operates in Japan and the US, and the Security division operates in the UK and India.

This figure illustrates InFusion Corporation's enterprise structure.



This table represents the selections that InFusion Corporation makes when specifying which legal entities to create on the Map Divisions by Country page.

Country	Enterprise	InFusion Lighting	InFusion Security
Japan	No	Yes	No
US	No	Yes	No



Country	Enterprise	InFusion Lighting	InFusion Security
UK	No	No	Yes
India	No	No	Yes

Based on the selections made in the preceding table, the ESC creates the following four legal entities:

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

Creating Legal Entities Using a Spreadsheet

If you have a list of legal entities already defined for your enterprise, you can upload them from a spreadsheet. To use this option, you first download a spreadsheet template, then add your legal entity information to the spreadsheet, and then upload directly to your enterprise configuration. You can export and import the spreadsheet multiple times to accommodate revisions.

Related Topics

- HCM Organization Models: Examples
- Payroll Statutory Units, Legal Employers, and Tax Reporting Units: How They Work Together
- Using Desktop Integrated Excel Workbooks: Points to Consider

Creating Business Units in the Enterprise Structures Configurator: Points to Consider

Business units are used within Oracle Fusion applications for management reporting, processing of transactions, and security of transactional data. Using the Enterprise Structures Configurator (ESC), you create business units for your enterprise either automatically or manually.

Automatically Creating Business Units

To create business units automatically, you must specify the level at which to create business units. Business units within your enterprise may be represented at one of two levels:

- Business function level, such as Sales, Consulting, Product Development, and so on.
- A more detailed level, where a business unit exists for each combination of countries in which you operate and the functions in those countries.

You can automatically create business units at the following levels:

- Country
- Country and Division
- · Country and business function
- Division



- Division and legal entity
- Division and business function
- Business function
- Legal entity
- Business function and legal entity

Select the option that best meets your business requirements, but consider the following:

- If you use Oracle Fusion Financials, the legal entity option is recommended because of the manner in which financial transactions are processed.
- The business unit level that you select determines how the application automatically creates reference data sets.

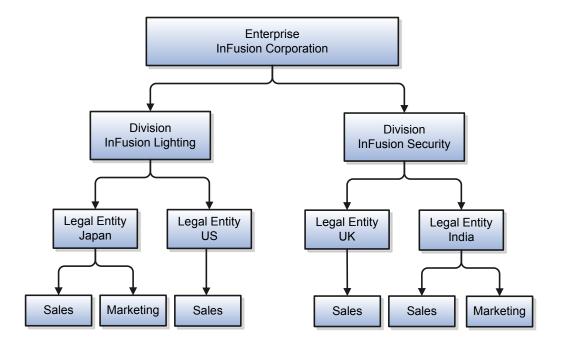
After you select a business unit level, the application generates a list of business units, and you select the ones you want the application to create. If you select a level that has two components, such as country and division, then the application displays a table listing both components. You select the check boxes at the intersections of the two components.

The business units listed by the application are suggestions only, and are meant to simplify the process to create business units. You aren't required to select all of the business units suggested. When you navigate to the next page in the ESC guided flow, the Manage Business Units page, you can't delete any of the business units created automatically. You must return to the Create Business Units page and deselect any business units that you no longer want.

Example: Selecting Business Unit Levels

InFusion Corporation is using the Enterprise Structures Configurator to set up its enterprise structure. InFusion has identified two divisions, one for Lighting, and one for Security. They operate in four countries: US, UK, Japan, and India, and they have created a legal entity for each of the countries. The sales and marketing functions are based in both India and Japan, while the US and the UK have only the sales function.

This figure illustrates InFusion Corporation's enterprise structure.





The following table lists the options for business unit levels and the resulting business units that the application suggests for InFusion Corporation.

Business Unit Level	Suggested Business Units
Country	USUKJapanIndia
Country and Division	 InFusion Lighting: Japan InFusion Lighting: US Infusion Security: UK Infusion Security: India
Country and business function	 Sales: Japan Marketing: Japan Sales: US Sales: UK Marketing: India Sales: India
Division	InFusion LightingInFusion Security
Division and Legal Entity	 InFusion Lighting: Japan InFusion Lighting: US Infusion Security: UK Infusion Security: India
Division and Business Function	 InFusion Lighting, Sales InFusion Lighting, Marketing InFusion Security, Sales InFusion Security, Marketing
Business Function	SalesMarketing
Legal Entity	 Legal Entity: Japan Legal Entity: US Legal Entity: UK Legal Entity India
Legal Entity and Business Function	 Legal Entity: Japan, Sales Legal Entity: Japan, Marketing Legal Entity: US, Sales Legal Entity: UK, Sales Legal Entity India, Marketing Legal Entity India, Sales



Manually Creating Business Units

If none of the levels for creating business units meets your business needs, you can create business units manually, and you create them on the Manage Business Units page. If you create business units manually, then no reference data sets are created automatically. You must create them manually as well.

Related Topics

- Reference Data Sets and Sharing Methods: Explained
- What reference data objects can be shared across asset books?

Creating Reference Data Sets in the Enterprise Structures Configurator: Explained

If you created business units automatically, then the Enterprise Structures Configurator automatically creates reference data sets for you. The Enterprise Structures Configurator creates one reference data set for each business unit. You can add additional sets, but you cannot delete any of the sets that were created automatically.

A standard set called the Enterprise set is predefined.

Common Set

The Common set is a predefined set that enables you to share reference data across business units. When you select setenabled data at the transaction level, the list of values includes data in the:

- Common set
- Set associated with the data type for the business unit on the transaction

For example, when you create an assignment, the list of values for grades includes grade in the:

- Common set
- Set that is assigned to grades for the business unit in which you creating the assignment

Jobs and Positions

Jobs and Positions: Critical Choices

Jobs and positions represent roles that enable you to distinguish between tasks and the individuals who perform those tasks.

Note the following:

- The key to using jobs or positions depends on how each is used.
- Positions offer a well-defined space independent of the person performing the job.
- Jobs are a space defined by the person.
- A job can be defined globally in the Common Set, whereas a position is defined within one business unit.



• You can update the job and department of a position at any time. For example, if you hire someone into a new role and want to transfer the position to another department.

During implementation, one of the earliest decisions is whether to use jobs or a combination of jobs and positions. The determinants for this decision are:

- The primary industry of your enterprise
- How you manage your people

Primary Industry of Your Enterprise

The following table outlines information about Primary industries and how they set up their workforce.

Primary Industry	Workforce Setup
Mining	Positions
Utilities	Positions
Manufacturing	Positions
Retail Trade	Positions
Transportation and Warehousing	Positions
Educational Services	Positions
Public Transportation	Positions
Agriculture, Forestry, Fishing, and Hunting	Jobs
Construction	Jobs
Wholesale Trade	Jobs
Information	Jobs
Finance and Insurance	Jobs
Professional, Scientific, and Technical Services	Jobs
Management of Companies and Enterprises	Jobs
Administrative and Support and Waste Management and Remediation Services	Jobs



Primary Industry	Workforce Setup
Arts, Entertainment, and Recreation	Jobs
Accommodation and Food Services	Jobs
Other Services (Except Public Administration)	Jobs

Management of People

The following table displays suggestions of whether to use jobs or a combination of jobs and positions based on your industry and how you manage your employee turnover.

Industry	You always replace employees by rehiring to same role	You replace the headcount, but the manager can use the headcount in a different job	You rehire to the same position, but the manager can request a reallocation of budget to a different post
Project (An industry that supports project-based forms of organization in which teams of specialists from both inside and outside the company report to project managers.)	Positions	Jobs	Jobs
Controlled (An industry that is highly structured in which all aspects of work and remuneration are well organized and regulated.)	Positions	Positions	Positions
Manufacturing	Positions	Jobs	Positions
Retail	Positions	Jobs	Positions
Education	Positions	Jobs	Positions
Other	Positions	Jobs	Jobs

Related Topics

· Grades and Grade Rates: How They Work with Jobs, Positions, Assignments, Compensation, and Payroll

Job and Position Structures: Explained

Job and position structures identify the descriptive flexfield structure that enables you to specify additional attributes that you want to capture when you define jobs and positions. Job and position attributes provide further detail to make jobs and positions more specific. You also use attributes to define the structure of your jobs and positions. You can specify attributes

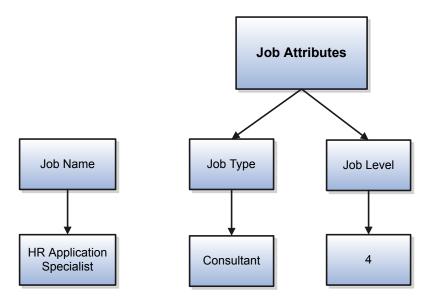


at the enterprise level for jobs and positions, at the business unit level for positions, and at the reference data set level for jobs. Job and position structures are optional.

Enterprise-Level Job Attributes

When you define a job, you enter a value for the name of the job. To make job names more specific, set up attributes to identify additional details about the job, such as the nature of the work that is performed or the relative skill level required. If these attributes apply to all jobs within your enterprise, set up enterprise-level job attributes. Standard capabilities mean that you can use the different segments of the name to identify common jobs or job holders for analysis or compensation, or for grouping records in reports, for example, to find all jobs of a specific job type. You should not use attributes with values that change regularly, for example, salary ranges or expense approval levels that change every year.

This figure illustrates how job type and job level provide further details for the HR Application Specialist job.

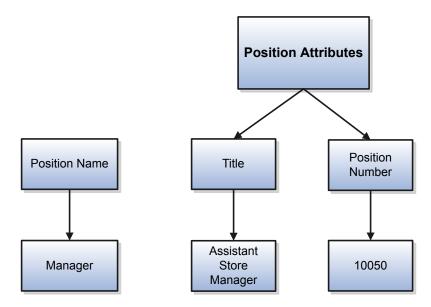


Enterprise-Level Position Attributes

Position attributes at the enterprise level are similar to those for jobs. Each position that you define identifies a specific role in the enterprise, which you can manage independently of the person in the position. A position belongs to one specific department or organization. The name of each position must be unique. To simplify the process of managing unique names for positions, set up enterprise-level attributes to identify separate components of the position name. For example, you can set up an attribute for position title and one for position number. When defining the attributes that make up the structure of a position name, consider whether any of your attributes are part of the definition of a common job type. Using job types for a position can help you manage common information that applies to many different positions. For example you can define a job type of Manager. Level 1 and use this for comparison of positions across departments or lines or business, or for setting common job requirements. You can then define multiple manager type positions in your HR department, each of which has responsibility for a different management function or group.



This figure illustrates how title and position number provide further details for the manager position.



Business Unit-Level Attributes for Positions

If you have information that you want to capture for positions that is specific to each business unit, then you can define attributes at the business unit level for positions. When you create positions, these attributes appear in addition to any enterprise-level attributes. For example, you may want to identify the sales region for all positions in the sales business unit. You can set up a text attribute called Sales Region and use it to enter the necessary information when creating positions for the sales business unit.

Reference Data Set-Level Attributes for Jobs

If you have information for jobs that applies to specific reference data sets, set up attributes for jobs at the reference data set level. When you create jobs, these attributes appear in addition to any enterprise-level attributes. For example, you may want to identify all information technology (IT) jobs within a specific set. You can set up a text attribute called Function and use it to enter IT in jobs that you create that perform an IT function within a specific set.

Jobs: Example

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

Software Industry

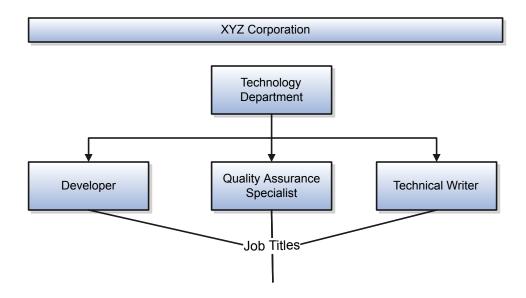
For example, XYZ Corporation has a director over the departments for developers, quality assurance, and technical writers.

- 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.



Positions: Examples

Positions are typically used by industries that use detailed approval rules, which perform detailed budgeting and maintain headcounts, or have high turnover rates.

Retail Industry

ABC Corporation has high turnovers. It loses approximately 5% of its cashiers monthly. The job of the cashier includes three positions: front line cashier, service desk cashier, and layaway cashier. Each job is cross-trained to take over another cashier's position. When one cashier leaves from any of the positions, another existing cashier from the front line, service desk or layaway can assist where needed. But to ensure short lines and customer satisfaction, ABC Corporation must replace each cashier lost to turnover. Since turnover is high in retail it's better for this industry to use positions.

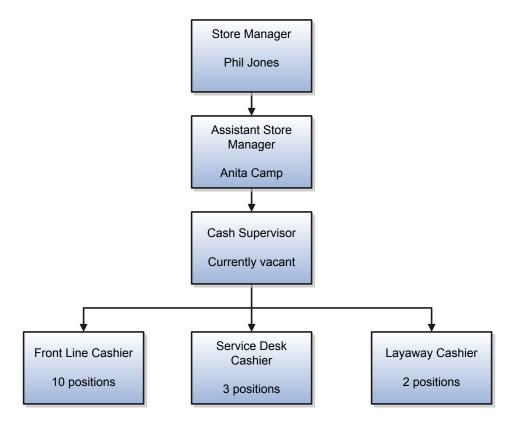
Note the following:

- An automatic vacancy is created when an employee terminates employment.
- The position exists even when there are no holders. Having the position continue to exist is important if the person who leaves the company is a manager or supervisor with direct reports.
- All direct reports continue reporting to the position even if the position is empty.
- You don't have to reassign these employees to another manager or supervisor. The replacement manager is assigned to the existing position.

Also, an added advantage to using Positions is when you hire somebody new, many of the attributes are inherited from the position. This speeds up the hiring process.



This figure illustrates the retail position setup.



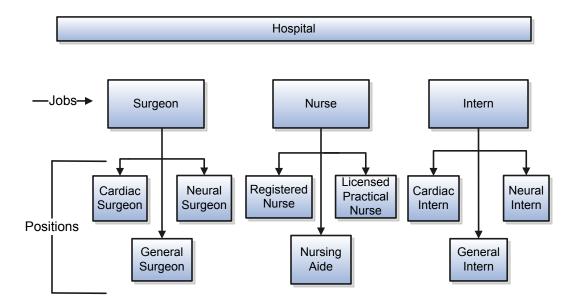
Health Care Industry

Health care is an industry that must regulate employment, roles, and compensation according to strict policies and procedures. Fixed roles tend to endure over time, surviving multiple incumbents. Industries that manage roles rather than individuals, where roles continue to exist after individuals leave, typically model the workforce using positions.

The hospital has a structured headcount and detailed budgeting. For example, a specific number of surgeons, nurses, and interns of various types are needed. These positions must be filled in order for the hospital to run smoothly. Use jobs and positions when you apply detailed headcount rules.



This figure illustrates the hospital position setup.



FAQs for Enterprise Structures Initial Configuration

What happens if I don't use the Enterprise Structures Configurator to set up my enterprise structures?

The Enterprise Structures Configurator is an interview-based tool that guides you through setting up divisions, legal entities, business units, and reference data sets. If you do not use the Enterprise Structures Configurator, then you must set up your enterprise structure using the individual tasks that correspond to each enterprise component. In addition, you can't set up multiple configurations and compare different scenarios. Using the Enterprise Structures Configurator is the recommended process for setting up your enterprise structures.

What's an ultimate holding company?

The legal entity that represents the top level in your organization hierarchy, as defined by the legal name entered for the enterprise. This designation is used only to create an organization tree, with these levels:

- Ultimate holding company as the top level
- Divisions and country holding companies as the second level
- Legal employers as the third level





6 Enterprise Structures: Maintenance

Define Reference Data Sharing

Reference Data Sharing: Explained

Reference data sharing facilitates sharing of configuration data such as jobs and payment terms, across organizational divisions or business units. You define reference data sets and determine how common data is shared or partitioned across business entities to avoid duplication and reduce maintenance effort. Depending on the requirement (specific or common), each business unit can maintain its data at a central location, using a set of values either specific to it or shared by other business units.

A common reference data set is available as the default set, which can be assigned to several business units sharing the same reference data. For commonly used data such as currencies, you can use the common reference data set and assign it to multiple business units in various countries that use the same currency. In cases where the default set can't be assigned to an entity, you can create specific sets. The data set visible on the transactional page depends on the sharing method used to share reference data.

For example, XYZ Corporation uses the same grades throughout the entire organization. Instead of different business units setting up and using the same grades, XYZ Corporation decides to create a set called Grades, which contains the grades. All business units in the organization have the Grades set so that the grades can be shared and used.

Note: For specific information about configuring reference data sharing for a particular object or product, refer to the relevant product documentation.

Related Topics

Reference Data Sets: Explained

Reference Data Sets and Sharing Methods: Explained

Oracle Fusion Applications reference data sharing feature is also known as SetID. The reference data sharing functionality supports operations in multiple ledgers, business units, and warehouses. As a result, there is a reduction in the administrative burden and the time to implement new business units. For example, you can share sales methods, or transaction types across business units. You may also share certain other data across asset books, cost organizations, or project units.

The reference data sharing features use reference data sets to which reference data is assigned. The reference data sets group assigned reference data. The sets can be understood as buckets of reference data assigned to multiple business units or other application components.

Reference Data Sets

You begin this part of your implementation by creating and assigning reference data to sets. Make changes carefully as changes to a particular set affect all business units or application components using that set. You can assign a separate set to each business unit for the type of object that is being shared. For example, assign separate sets for payment terms, transaction types, and sales methods to your business units.



Your enterprise can determine that certain aspects of your corporate policy can affect all business units. The remaining aspects are at the discretion of the business unit manager to implement. This allows your enterprise to balance autonomy and control for each business unit. For example, your enterprise holds business unit managers accountable for their profit and loss, but manages working capital requirements at a corporate level. In such a case, you can let managers define their own sales methods, but define payment terms centrally. In this example:

- Each business unit has its own reference data set for sales methods.
- One central reference data set for payment terms is assigned to all business units.

The reference data sharing is especially valuable for lowering the cost of setting up new business units. For example, your enterprise operates in the hospitality industry. You are adding a new business unit to track your new spa services. The hospitality divisional reference data set can be assigned to the new business unit to quickly set up data for this entity component. You can establish other business unit reference data in a business unit-specific reference data set as needed.

Reference Data Sharing Methods

Variations exist in the methods used to share data in reference data sets across different types of objects. The following list identifies the methods:

- Assignment to one set only, no common values allowed. This method is the simplest form of sharing reference
 data that allows assigning a reference data object instance to one and only one set. For example, Asset Prorate
 Conventions are defined and assigned to only one reference data set. This set can be shared across multiple asset
 books, but all the values are contained only in this one set.
- Assignment to one set only, with common values. This method is the most commonly used method of sharing
 reference data that allows defining reference data object instance across all sets. For example, Receivables
 Transaction Types are assigned to a common set that is available to all the business units. You need not explicitly
 assign the transaction types to each business unit. In addition, you can assign a business unit-specific set of
 transaction types. At transaction entry, the list of values for transaction types includes the following:
 - Transaction types from the set assigned to the business unit.
 - Transaction types assigned to the common set that is shared across all business units.
- Assignment to multiple sets, no common values allowed. The method of sharing reference data that allows a
 reference data object instance to be assigned to multiple sets. For instance, Payables Payment Terms use this
 method. It means that each payment term can be assigned to one or more than one set. For example, you assign
 the payment term Net 30 to several sets, but assign Net 15 to a set specific only to your business unit. At transaction
 entry, the list of values for payment terms consists of only the set that is assigned to the transaction's business unit.
- Note: Oracle Fusion Applications contains a reference data set called Enterprise. Define any reference data that affects your entire enterprise in this set.

Related Topics

- Items and Supplier Site Reference Data Sharing: Explained
- What reference data objects can be shared across cost organizations?
- What reference data objects can be shared across project units?
- What reference data objects can be shared across asset books?



Assigning Reference Data Sets to Reference Objects: Points to Consider

You can assign the reference data sets to reference objects using the Manage Reference Data Set Assignments page. For multiple assignments, you can classify different types of reference data sets into groups and assign them to the reference entity objects. The assignment takes into consideration the determinant type, determinant, and reference group, if any.

Determinant Types

The partitioned reference data is shared using a business context setting called the determinant type. A determinant type is the point of reference used in the data assignment process. The following table lists the determinant types used in the reference data assignment.

Туре	Description
Asset Book	Information about the acquisition, depreciation, and retirement of an asset that belongs to a ledger or a business unit.
Business Unit	The departments or organizations within an enterprise.
Cost Organization	The organization used for cost accounting and reporting on various inventory and cost centers within an enterprise.
Project Unit	A logical organization within an enterprise that is responsible for enforcing consistent project management practices.
Reference Data Set	References to other shared reference data sets.

Determinant

The determinant (also called determinant value) is a value that corresponds to the selected determinant type. The determinant is one of the criteria for selecting the appropriate reference data set.

Reference Groups

A transactional entity may have multiple reference entities (generally considered to be setup data). However, all reference entities are treated alike because of similarity in implementing business policies and legal rules. Such reference entities in your application are grouped into logical units called reference groups. For example, all tables and views that define Sales Order Type details might be a part of the same reference group. Reference groups are predefined in the reference groups table.

FAQs for Define Reference Data Sharing

What reference data objects can be shared across business units?

The following list contains the reference data objects for the Oracle Fusion Applications that can be shared across business units and the method in which the reference data for each is shared.



Application Name	Reference Data Object	Method of Sharing
Trading Community Model	Customer Account Relationship	Assignment to one set only, no common values allowed
Trading Community Model	Customer Account Site	Assignment to one set only, no common values allowed
Trading Community Model	Salesperson	Assignment to one set only, no common values allowed
Opportunity Management	Sales Method Group	Assignment to one set only, with common values
Work Management	Assessment Templates	Assignment to one set only, with common values
Enterprise Contracts	Contract Types	Assignment to one set only, with common values
Sales	Sales Method	Assignment to one set only, with common values
Common Components	Activity Templates	Assignment to one set only, with common values
Payables	Payment Terms	Assignment to multiple sets, no common values allowed
Receivables	Accounting Rules	Assignment to one set only, with common values
Receivables	Aging Buckets	Assignment to one set only, with common values
Receivables	Auto Cash Rules	Assignment to one set only, with common values
Receivables	Collectors	Assignment to one set only, with common values
Receivables	Lockbox	Assignment to one set only, with common values
Receivables	Memo Lines	Assignment to one set only, with common values
Receivables	Payment Terms	Assignment to one set only, with common values



Application Name	Reference Data Object	Method of Sharing
Receivables	Remit To Address	Assignment to one set only, with common values
Receivables	Revenue Contingencies	Assignment to one set only, with common values
Receivables	Transaction Source	Assignment to one set only, with common values
Receivables	Transaction Type	Assignment to one set only, with common values
dvanced Collections	Collections Setups	Assignment to one set only, with common values
dvanced Collections	Dunning Plans	Assignment to one set only, with common values
ax	Tax Classification Codes	Assignment to multiple sets, no common values allowed
luman Resources	Departments	Assignment to one set only, with common values
łuman Resources	Jobs	Assignment to one set only, with common values
luman Resources	Locations	Assignment to one set only, with common values
luman Resources	Grades	Assignment to one set only, with common values
roject Billing	Project and Contract Billing	Assignment to multiple sets, no common values allowed
roject Foundation	Project Accounting Definition	Assignment to one set only, no common values allowed
Project Foundation	Project Rates	Assignment to one set only, with common values
Order Management	Hold Codes	Assignment to one set only, with common values
rder Management	Orchestration Process	Assignment to one set only, with common values



Define Legal Jurisdictions and Authorities for Human Capital Management

Jurisdictions and Legal Authorities: Explained

You are required to register your legal entities with legal authorities in the jurisdictions where you conduct business. Register your legal entities as required by local business requirements or other relevant laws. For example, register your legal entities for tax reporting to report sales taxes or value added taxes.

Define jurisdictions and related legal authorities to support multiple legal entity registrations, which are used by Oracle Fusion Tax and Oracle Fusion Payroll. When you create a legal entity, the Oracle Fusion Legal Entity Configurator automatically creates one legal reporting unit for that legal entity with a registration.

Jurisdictions: Explained

Jurisdiction is a physical territory such as a group of countries, country, state, country, or parish where a particular piece of legislation applies. French Labor Law, Singapore Transactions Tax Law, and US Income Tax Laws are examples of particular legislation that apply to legal entities operating in different countries' jurisdictions. Judicial authority may be exercised within a jurisdiction.

Types of jurisdictions are:

- Identifying Jurisdiction
- Income Tax Jurisdiction
- Transaction Tax Jurisdiction

Identifying Jurisdiction

For each legal entity, select an identifying jurisdiction. An identifying jurisdiction is your first jurisdiction you must register with to be allowed to do business in a country. If there is more than one jurisdiction that a legal entity must register with to commence business, select one as the identifying jurisdiction. Typically the identifying jurisdiction is the one you use to uniquely identify your legal entity.

Income tax jurisdictions and transaction tax jurisdictions do not represent the same jurisdiction. Although in some countries, the two jurisdictions are defined at the same geopolitical level, such as a country, and share the same legal authority, they are two distinct jurisdictions.

Income Tax Jurisdiction

Create income tax jurisdictions to properly report and remit income taxes to the legal authority. Income tax jurisdictions by law impose taxes on your financial income generated by all your entities within their jurisdiction. Income tax is a key source of funding that the government uses to fund its activities and serve the public.

Transaction Tax Jurisdiction

Create transaction tax jurisdictions through Oracle Fusion Tax in a separate business flow, because of the specific needs and complexities of various taxes. Tax jurisdictions and their respective rates are provided by suppliers and require periodic maintenance. Use transaction tax jurisdiction for legal reporting of sales and value added taxes.



Legal Authorities: Explained

A legal authority is a government or legal body that is charged with powers to make laws, levy and collect fees and taxes, and remit financial appropriations for a given jurisdiction.

For example, the Internal Revenue Service is the authority for enforcing income tax laws in United States. In some countries, such as India and Brazil, you are required to print legal authority information on your tax reports. Legal authorities are defined in the Oracle Fusion Legal Entity Configurator. Tax authorities are a subset of legal authorities and are defined using the same setup flow.

Legal authorities are not mandatory in Oracle Fusion Human Capital Management (HCM), but are recommended and are generally referenced on statutory reports.

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.
- 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:

- 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.
- 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.

Creating Legal Entities, Registrations, and Reporting Units: Examples

Define a legal entity for each registered company or other entity recognized in law for which you want to record assets, liabilities, and income, pay transaction taxes, or perform intercompany trading.

Legal Entity

Create a legal entity by following these steps:

- 1. Navigator > Setup and Maintenance > Manage Legal Entity > Go to Task.
- **2.** Accept the default **Country**, United States.
- 3. Enter Name, InFusion USA West.
- 4. Enter Legal Entity Identifier, US0033.
- 5. Optionally enter Start Date. When the start date is blank the legal entity is effective from the creation date.
- 6. Optionally enter an End Date.
- 7. Optionally, if your legal entity should be registered to report payroll tax and social insurance, select the **Payroll statutory unit** check box.
- 8. Optionally, if your legal entity has employees, select the Legal employer check box.



- 9. Optionally, if this legal entity is not a payroll statutory unit, select an existing payroll statutory unit to report payroll tax and social instance on behalf of this legal entity.
- 10. Enter the Registration Information
- **11.** Accept the default **Identifying Jurisdiction**, United States Income Tax.
- **12.** Search for and select a **Legal Address**, 500 Oracle Parkway, Redwood Shores, CA 94065.

The legal address must have been entered previously using the **Manage Legal Address** task.

- 13. OK.
- **14.** Optionally enter a **Place of Registration**.
- **15.** Enter the **EIN or TIN**.
- 16. Enter the Legal Reporting Unit Registration Number.
- 17. Save and Close.
- 18. Navigator > Setup and Maintenance > Define Legal Entries > Manage Legal Entity > Select... to set scope.
- 19. Select the Manage Legal Entity.
- 20. In the *Legal Entity list, select Select and Add.
- 21. Click Apply and Go to Task.
- **22.** Select your legal entity.
- 23. Save and Close on the very bottom of the window.

This sets the scope for your task list to the selected legal entity.

24. Save and Close.

Legal Entity Registrations

A legal entity registration with the same name as that of the legal entity is created by default. To verify this, locate the **Manage Legal Entity Registrations** task and then select **Go to Task**. To create another registration for the legal entity follow these steps:

- 1. Navigator > Setup and Maintenance > Manage Legal Entity Registrations: Verify that the Legal Entity scope value is set correctly.
- 2. Go to Task.
- 3. Select Create.
- 4. Enter Jurisdiction.
- Enter Registered Address.
- 6. Enter Registered Name.
- Optionally enter Alternate Name, Registration Number, Place of Registration, Issuing Legal Authority, and Issuing Legal Authority Address, Start Date, and End Date.
- 8. Save and Close.

Legal Reporting Unit

When a legal entity is created, a legal reporting unit with the same name as that of the entity is also automatically created. To create more legal reporting units or modify the settings follow these steps:

- 1. Navigator > Setup and Maintenance > Define Legal Reporting Unit. > Manage Legal Reporting Unit. Verify that the Legal Entity scope value is set correctly.
- 2. Go to Task
- 3. Select Create.
- 4. Enter Territory, United States.
- 5. Enter Name.
- **6.** Optionally enter a **Start Date**.
- 7. Enter Registration Information.
- 8. Search for and select Jurisdiction.
- 9. Enter Main Legal Reporting Unit information.



- **10.** Select the value Yes or No for the **Main Legal Reporting Unit**. Set value to yes only if you are creating a new main (primary) legal reporting unit.
- **11.** Enter the **Main Effective Start Date**, 1/1/11.
- 12. Save and Close.

Related Topics

- Legal Entities: Explained
- Planning Legal Reporting Units: Points to Consider
- Legal Entity in Oracle Fusion: Points to Consider

Define Legal Entities for Human Capital Management

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.

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

Legal Entities: Explained

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

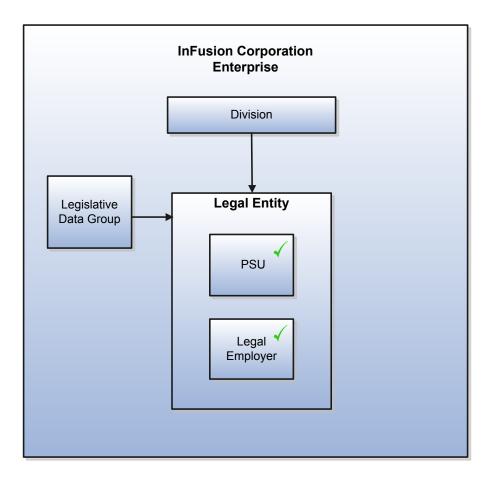
This example illustrates a simple configuration that does not include any tax reporting units.

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.

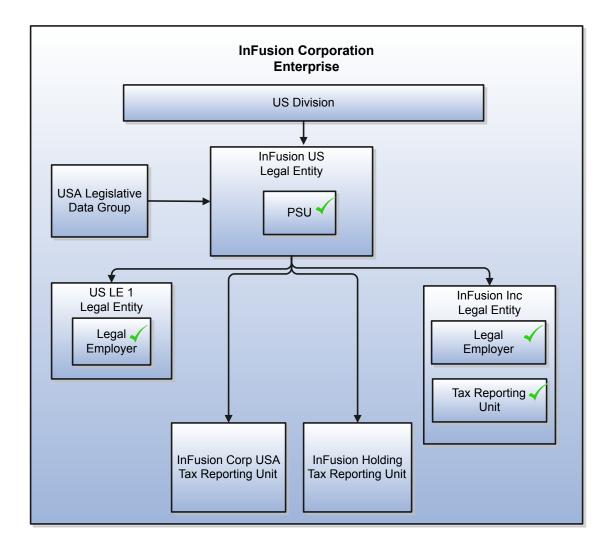
The implication is that payroll statutory reporting boundaries vary from human resources (HR) management, and you can categorize the balances separately by one of the following:

- 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.



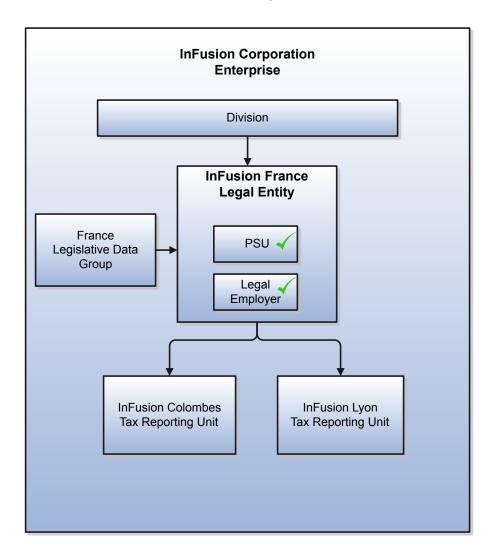
One Payroll Statutory Unit and Two Tax Reporting Units

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.

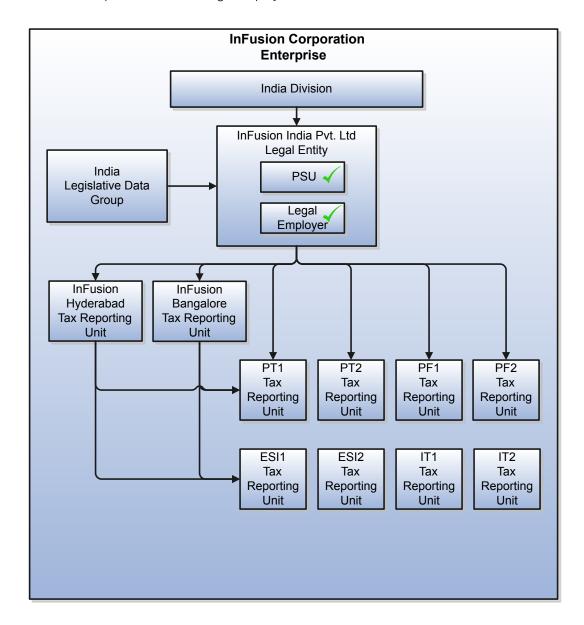
Using this model, you wouldn't typically:

- 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.

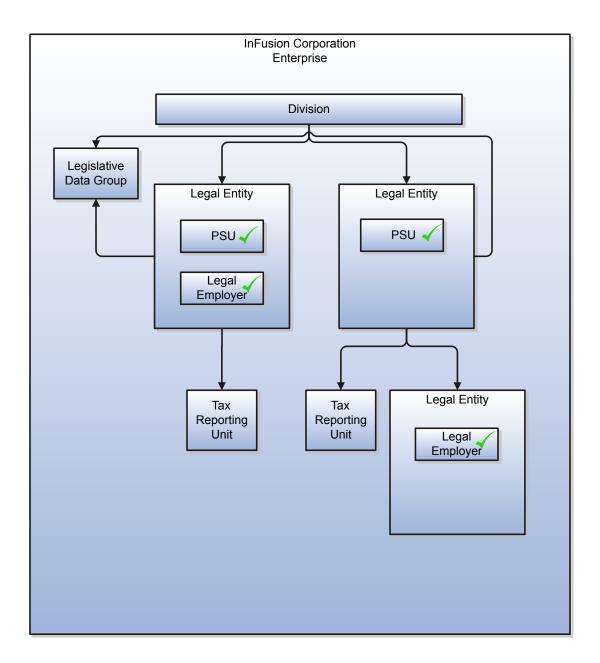
Using this model, you wouldn't typically:

- 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.



Related Topics

• Legal Entities: Explained



Creating Calculation Cards for Deductions at Different Levels: Examples

You can create and manage calculation cards at several different levels, from an individual person to a payroll statutory unit. Use the cards to capture information specific to a person or organization, such as an employee's tax filing status or an employer's tax identification number. Calculation card entries override default values defined at other levels. The priority of information, from highest to lowest, is as follows:

- 1. Personal calculation card (payroll relationship level)
- 2. Tax reporting unit calculation card
- 3. Payroll statutory unit calculation card
- 4. Calculation value definitions (legislative data group level)
- Note: Not all countries or territories support creating calculation cards for payroll statutory units and tax reporting units. The enterable values at each level also vary by country or territory. The basic steps to create and manage calculation cards are the same at all levels.

Use these examples to understand when you might define calculation cards at each level.

Personal Calculation Card

Scenario: An employee qualifies for a special reduced tax rate.

Task: Manage Calculation Cards task in the Payroll Administration work area.

Tax Reporting Unit Card

Scenario: The income tax exemption amount is 2000 USD at the legislative data group level, but a tax reporting unit in a particular state or province uses an exemption amount of 2500 USD. Enter this default value for the tax reporting unit, which can be overridden on personal calculation cards.

Task: Manage Legal Reporting Unit Calculation Cards task in the Setup and Maintenance work area.

Payroll Statutory Unit Card

Scenario: During application setup, the implementation team defines default contribution rates for the payroll statutory unit.

Task: Manage Legal Entity Calculation Cards task in the Setup and Maintenance work area.

Calculation Value Definition

Scenario: You can view the predefined income tax rates for your country, but you cannot edit them.

Task: Manage Calculation Value Definitions task in the Payroll Calculation work area.

If an employer qualifies for a special tax rate, enter these values on a calculation card at the appropriate level.

Related Topics

Creating a Personal Calculation Card: Worked Example



FAQs for Define Legal Entities for Human Capital Management

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 legal address?

A legal address is the mailing address of a legal entity or legal authority. A legal address is also the address a legal entity uses to register with a legal authority.

You can use legal addresses to send correspondence, such as invoices, bills, reports, and so on, to a legal entity or authority.

Note:

- You must create legal addresses before creating legal entities
- You can create legal addresses for legal authorities when creating legal authorities

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.

What's a tax reporting unit?

Use a tax reporting unit to group workers for the purpose of tax and social insurance reporting. A tax reporting unit is the Oracle Fusion Human Capital Management (HCM) version of the legal reporting unit in Oracle Fusion Applications.

To create a tax reporting unit, you use the Oracle Fusion Legal Entity Configurator to define a legal entity as a payroll statutory unit. When you identify a legal entity as a payroll statutory unit, the application transfers the legal reporting units that are associated with that legal entity to Oracle Fusion HCM as tax reporting units. You can then access the tax reporting unit using the Manage Legal Reporting Unit HCM Information task.



If you identify a legal entity as a legal employer, and not as a payroll statutory unit, you must enter a parent payroll statutory unit. The resulting legal reporting units are transferred to Oracle Fusion HCM as tax reporting units, but as children of the parent payroll statutory unit that you entered, and not the legal entity that you identified as a legal employer.





7 Workforce Structures: Organizations

Designing an Enterprise Configuration: Example

This example illustrates how to set up an enterprise based on a global company operating mainly in the US and the UK with a single primary industry.

Scenario

InFusion Corporation is a multinational enterprise in the high technology industry with product lines that include all the components that are required to build and maintain air quality monitoring systems for homes and businesses. Its primary locations are in the US and the UK, but it has smaller outlets in France, Saudi Arabia, and the United Arab Emirates (UAE).

Enterprise Details

In the US, InFusion employs 400 people and has company revenue of 120 million US dollars.. Outside the US, InFusion employs 200 people and has revenue of 60 million US dollars.

Analysis

InFusion requires three divisions.

- The US division covers the US locations.
- The Europe division covers UK and France.
- Saudi Arabia and the UAE are covered by the Middle East division.

InFusion requires legal entities with legal employers, payroll statutory units, tax reporting units, and legislative data groups for the US, UK, France, Saudi Arabia, and UAE, to employ and pay its workers in those countries.

InFusion requires a number of departments across the enterprise for each area of business, such as sales and marketing, and a number of cost centers to track and report on the costs of those departments.

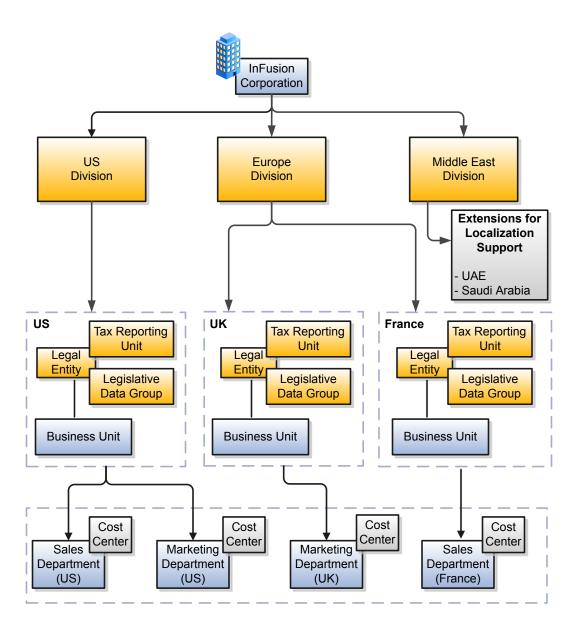
InFusion has general managers responsible for business units within each country. Those business units may share reference data. Some reference data can be defined within a reference data set that multiple business units may subscribe to. Business units are also required for financial purposes. Financial transactions are always processed within a business unit.

Resulting Enterprise Configuration

Based on this analysis, InFusion requires an enterprise with multiple divisions, ledgers, legal employers, payroll statutory units, tax reporting units, legislative data groups, departments, cost centers, and business units.



This figure illustrates the enterprise configuration that results from the analysis of InFusion Corporation.



Related Topics

- Enterprise Structures: Overview
- Modeling Your Enterprise Management Structure in Oracle Fusion: Example



Using Single or Multiple Classifications for an Organization: Points to Consider

Organization classifications define the purpose of the organization, whether it's a department, a division, or a legal entity. In some enterprises, organization classifications overlap, which means that the same organization can be assigned multiple classifications. For example, one organization within an enterprise might be both a project organization and a department. The classifications of organizations vary according to business objectives, legal structure, industry, company culture, size and type of growth. You can create organizations in Oracle Fusion with one or more classifications to reflect your enterprise structure.

Defining an Organization with One Classification

Define each organization in your enterprise as a separate organization with a single classification to reflect your enterprise structure and provide flexibility for expansion. The advantage of setting up separate organizations is the ability to add further organizations to expand the enterprise easily. For example, if your enterprise acquires another company which has a different line of business in a country in which you employ people, you can create a division, a legal entity, and additional departments. Classify the new legal entity as a legal employer and payroll statutory unit for the company's payroll tax and social insurance.

Defining an Organization with Multiple Classifications

Define an organization with multiple classifications if the organization has multiple purposes. For example, use an organization within the Oracle Sales Cloud applications as a department that employs salespeople and classify it as a department and a sales organization. Or, if your enterprise operates and employs people in multiple countries, create a legal entity for each country using the Manage Legal Entity task. Then use the Manage Departments task to classify the legal entity as a department.

Related Topics

Modeling Your Financial Reporting Structure in Oracle Fusion: Example

Disability Organizations: Explained

Set up disability organizations to identify the external organizations with which workers with disabilities are registered. You manage disability organizations in the Workforce Structures work area. Disability organizations can also assess the degree to which a person is affected by the disability.

Disability organizations:

- Provide information and support to people with disabilities. The Royal National Institute of Blind People is an example of a disability organization.
- Can also assess the degree to which the disability affects a person



Disability Organizations and Person Records

When you create person records for workers with disabilities, you select the disability organization with which the worker is registered, identify the registration and expiration dates, and enter any other descriptive or legislative information that pertains to the disability.

To create disability organizations as TCA parties, use the Manage Third Parties task from the Setup and Maintenance work area, and select the disability organization party usage code.

Related Topics

Person Records: Explained

· Creating Third Parties: Points to Consider

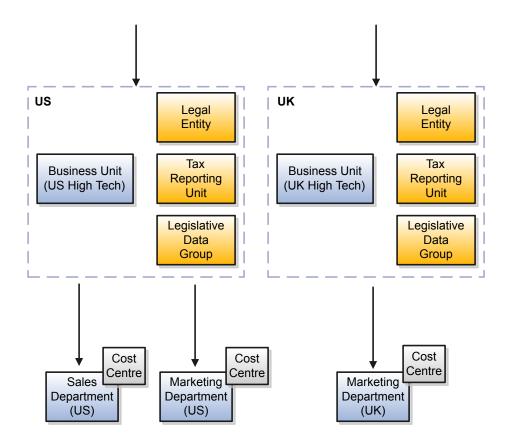
Department: Explained

A department is an organization to which you assign workers. It is an organization with one or more operational objectives or responsibilities that exist independently of its manager. You track the department's financial performance through one or more cost centers. For example, sales, research and development, and human resources. You can report and keep track of headcount by creating a department hierarchy using Oracle Fusion Trees.

Departments and cost centers example:



This figure illustrates how departments belong to legal entities within the enterprise structure.



Departments and Cost Centers

A cost center represents the smallest segment of an organization for which you allocate and report on costs. The manager of a department is typically responsible for cost control by meeting a budget and may be responsible for the assets used by the department. You can track the financial performance of a department through one or more cost centers.

Uploading Departments Using a Spreadsheet

If you have a list of departments already defined for your enterprise, you can upload them from a spreadsheet. To use this option, you first download a spreadsheet template, add your department information to the spreadsheet, and then upload directly to your enterprise configuration. You can upload the spreadsheet multiple times to accommodate revisions.

Related Topics

Uploading Workforce Structures Using a Spreadsheet: Explained

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.

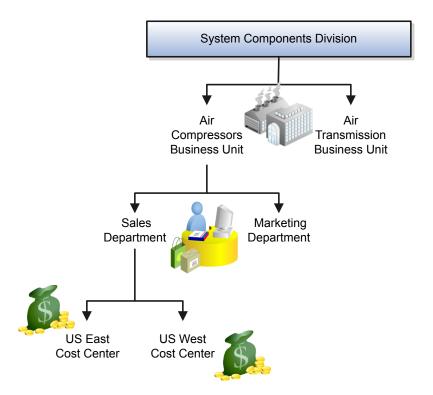
In addition, you must classify departments as project expenditure organizations to enable associating them to project expenditure items. Both project owning organizations and project expenditure organizations can be used by Oracle Fusion Subledger Accounting to derive accounts for posting Oracle Fusion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

Creating a Chart of Account for Creating a Department: Worked Example

This example demonstrates how to create a chart of account for HCM implementations. You must set up a minimal chart of account to associate a company and cost center with departments. This topic describes a simple scenario primarily intended for use within HCM. For more detailed information on setting up a chart of account, refer to the Financials product documentation.

Vision Corporation US is a US-based legal entity with cost centers in Arizona and California. In this example, we will create a Arizona cost center and associate it with the Sales Department.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In this Example
What should be the validation type for the value set?	Independent. Only this type is supported for creating General Ledger (GL) cost center information for departments in HCM.
What should be the segment labels for the chart of account?	The first segment is Primary Balancing Segment and the second segment is Cost Center Segment. Selecting these labels in the above order is crucial in specifying the General Ledger cost center information for a department.

Summary of Tasks

In the Setup and Maintenance work area, create a chart of account and cost center value sets to create a chart of account structure and instance, and then associate it with the department.

- 1. Create the chart of account value set for the Vision Corporation US enterprise.
- 2. Specify Arizona and California as the values for the chart of account value set
- 3. Create the cost center value set for the Vision Corporation US enterprise.
- 4. Specify Arizona and California as the values for the cost center value set.
- 5. Create the chart of account structure by associating it with the chart of account and cost center value sets you created earlier.
- **6.** Create the chart of account structure instance by associating it with the structure.
- 7. Specify the General Ledger cost center information by associating it with the chart of account and the cost center you created earlier, for creating the sales department.



Creating a Chart of Account Value Set

- 1. In the Setup and Maintenance work area, search for and click the Manage Chart of Accounts Value Sets task.
- 2. Click Create.
- 3. Complete the fields as shown in this table.

Field	Value
Value Set Code	Vision Corporation US Value Set 1
Description	Vision Corporation US Value Set 1
Module	Common Shared Setups
Validation Type	Independent
Value Data Type	Character
Value Subtype	Text
Maximum Length	5

4. Click Save and Close.

Specifying Values for the Chart of Account Value Set

- 1. On the Manage Chart of Accounts Value Sets page, search and select Vision Corporation US Value Set 1 from the search results.
- 2. Click Manage Values.
- 3. Click Create.
- 4. Complete the fields as shown in this table.

Field	Value
Value	AZ
Description	Arizona
Enabled	Select the check box

- 5. Click Save and Close.
- 6. Create additional values for the Vision Corporation US Value Set 1 as shown in this table.



Field	Value
Value	CA
Description	California
Enabled	Select the check box

7. On the Manage Values page, click Save and Close.

Creating a Cost Center Value Set

- 1. In the Setup and Maintenance work area, search for and click the **Manage Chart of Accounts Value Sets** task.
- 2. Click Create.
- 3. Complete the fields as shown in this table.

Field	Value
Value Set Code	Vision Corporation US Cost Center Value Set 1
Description	Vision Corporation US Cost Center Value Set 1
Module	Common Shared Setups
Validation Type	Independent
Value Data Type	Character
Value Subtype	Text
Maximum Length	5

4. Click Save and Close.

Specifying Values for the Cost Center Value Set

- 1. On the Manage Chart of Accounts Value Sets page, search and select Vision Corporation US Cost Center Value Set 1 from the search results.
- 2. Click Manage Values.
- 3. Click Create.
- 4. Complete the fields as shown in this table.

Field	Value
Value	AZ



Field	Value
Description	Arizona
Enabled	Select the check box

- 5. Click Save and Close.
- 6. Create additional values for the Vision Corporation US Value Set 1 as shown in this table.

Field	Value
Value	CA
Description	California
Enabled	Select the check box

7. On the Manage Values page, click **Save and Close**.

Creating a Chart of Account Structure

- 1. In the Setup and Maintenance work area, search for and click the **Manage Chart of Accounts Structure** task.
- 2. Search and select the GL# key flexfield code.
- 3. Click Manage Structures.
- 4. Click Create.
- 5. Complete the fields as shown in this table.

Field	Value
Structure Code	Vision Corp CoA Cost Center
Name	Vision Corp CoA Cost Center
Description	Vision Corporation Chart of Account Cost Center
Delimiter	Select any value

- 6. Click Save.
- 7. In the Segments section, click **Create**.
- **8.** Complete the fields as shown in this table.

Field	Value
Segment Code	Vision_Corp_COA
API Name	visionCorpCoa



Field	Value
Name	Vision Corporation COA
Sequence Number	1
Prompt	Vision Corporation COA
Short Prompt	Vision
Enabled	Select the check box
Display Width	1
Range Type	Low
Column Name	SEGMENT1
Default Value Set Code	Vision Corporation US Value Set 1
Selected Labels	Primary Balancing Segment

9. Click Save and Close.

10. Create another segment with the following values

Field	Value
Segment Code	Vision_ Corp_ CostCenter_ COA
API Name	visionCorpCostcenterCoa
Name	Vision Corporation Cost Center COA
Sequence Number	2
Prompt	Vision Corporation Cost Center COA
Short Prompt	Vision1
Enabled	Select the check box
Display Width	1
Range Type	Low
Column Name	SEGMENT2



Field	Value
Default Value Set Code	Vision Corporation US Cost Center Value Set 1
Selected Labels	Cost Center Segment

- 11. Click Save and Close.
- 12. On the Create Key Flexfield Structure page, click Save and Close.

Creating a Chart of Accounts Structure Instance

- 1. In the Setup and Maintenance work area, search for and click the **Manage Chart of Accounts Structure Instances** task.
- 2. Search and select the **GL#** key flexfield code.
- 3. Click Manage Structure Instances.
- 4. Click Create.
- 5. Complete the fields as shown in this table.

Field	Value
Structure Instance Code	Vision COA Structure Instance
API name	VisionCoaStructureInstance
Name	Vision Corporation COA Structure Instance
Structure Name	Vision Corp CoA Cost Center

6. Click Save and Close.

Specifying the General Ledger Cost Center Information for Creating a Department

- 1. In the Workforce Structures work area, click the **Manage Departments** tab.
- 2. Click Create.
- 3. Select the Create new option.
- 4. Enter Sales Department in the Name field.
- 5. Click Next.
- 6. In the GL Cost Center Information section, complete the fields as shown in this table.

Field	Value
Record Identifier	10
Company Value Set	Vision Corporation US Value Set 1



Field	Value		
Company	AZ		
Company	AZ		
Cost Center Value Set	Vision Corporation US Cost Center Value Set 1		
Cost Center	AZ		

- 7. Click **Next** to review the specified information.
- 8. Click Submit.

Locations: Explained

A location identifies physical addresses of a workforce structure, such as a department or a job. You create and manage locations using the Manage Locations task in the Workforce Structures work area.

You can also create locations to enter the addresses of external organizations that you want to maintain, such as employment agencies, tax authorities, and insurance or benefits carriers.

The locations that you create exist as separate structures that you can use for reporting purposes, and in rules that determine employee eligibility for various types of compensation and benefits. You enter information about a location only once. Subsequently, when you set up other workforce structures you select the location from a list.

Location Sets

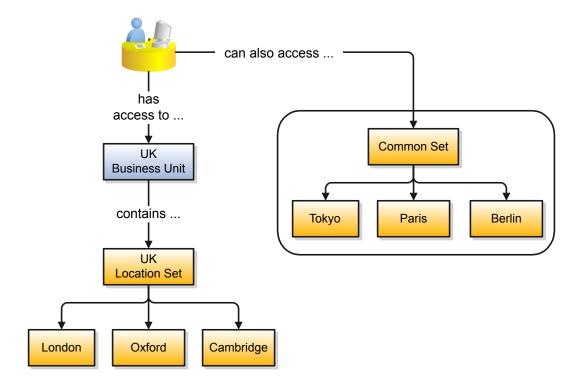
When you create a location, you must associate it with a set. Only those users who have access to the set's business unit can access the location set and other associated workforce structure sets, such as those that contain departments and jobs.

Note the following:

- You can also associate the location to the common set so that users across your enterprise can access the location irrespective of their business unit.
- When users search for locations, they can see the locations that they have access to along with the locations in the common set.



The following figure shows how locations sets restrict access to users.



Uploading Locations Using a Spreadsheet

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

To use this option:

- Download a spreadsheet template
- Add your location information to the spreadsheet
- Upload directly to your enterprise configuration

You can upload the spreadsheet multiple times to accommodate revisions.

Related Topics

- What happens if I inactivate a location?
- Uploading Workforce Structures Using a Spreadsheet: Explained

Action Components: How They Work Together

Actions track changes to Human Capital Management (HCM) records, such as changes to employment and assignment records. When you create or update these records, the action identifies the cause of the creation or change.



Action

You can view a history of effective-dated changes (assignment history, for example), and the action and reason details are particularly useful for reporting and tracking.

You can use actions to categorize the type of change. Each predefined termination action is associated with a termination type (either voluntary or involuntary) to help categorize the termination. For example, the termination actions Death and Reduction in Force are categorized as voluntary and involuntary respectively.

In certain cases, actions determine the business flow. For example, you can select from a list of employment-related actions, such as Assignment Change, Transfer, or Termination. The action you select determines the path you take through the current business flow.

To create your own actions, use the Manage Actions task in the Setup and Maintenance work area.

Note: If you are creating your own termination-related action, it is highly recommended that you specify the termination type for the action, whether it is voluntary or involuntary. This information is useful for analysis and reporting purposes.

Action Reason

You can optionally associate reasons with actions, which is primarily useful for analysis and reporting purposes. For example, a generic action of termination could have reasons such as voluntary retirement or involuntary layoff. You can view the action and reason details in the Employee Termination Report. Line managers can view predictions about who is likely to leave voluntarily, which are based on existing and historical terminations data.

The process that generates the predictions uses the action and reason data to identify whether a termination is voluntary or involuntary. When managers allocate compensation to their workers, they can select from a list of action reasons that help identify the type of or reason for the compensation allocation.

Action Type

An action type:

- Identifies the type of business process associated with the action and determines what happens when you select an
 action.
- Is associated with one or more predefined actions.

You can associate the actions you create with the predefined action types. For example, the Hire an Employee action type is associated with the Hire action. You could create an action Hire Part-Time and associate it with the Hire an Employee action type. Your action will then appear in the Actions list in the Hire an Employee page. To hire a part-time employee, users can select the Hire Part-Time action instead of the predefined Hire action

Employment Model: Explained

The employment model comprises two types of entities, which are work relationships and assignments. To configure employment models for the enterprise or for individual legal employers, use the Manage Enterprise HCM Information and Manage Legal Entity HCM Information tasks in the Setup and Maintenance work area respectively.



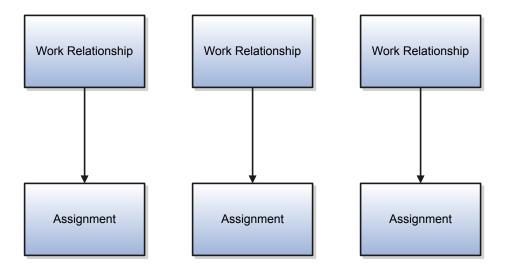
When you configure the employment model for the enterprise or legal employer (when you create or update the enterprise or legal employer), you can select from three options:

- Single Assignment
- Single Assignment with Contract
- Multiple Assignments

Single Assignment

If you select Single Assignment, each work relationship of any type has one assignment only.

The assignment is created automatically when the work relationship is created.

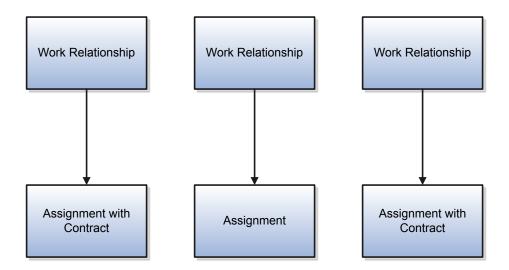


Single Assignment with Contract

If you select Single Assignment with Contract, users can include contract information in the single assignment.



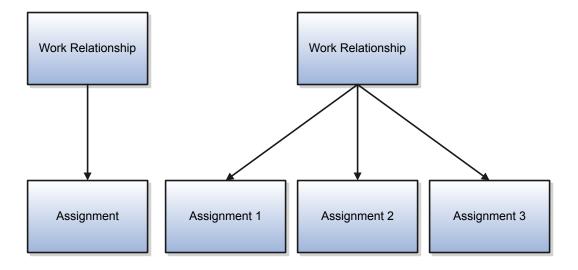
Creating the work relationship automatically creates the assignment. Including contract information in the assignment is optional.



Multiple Assignments

If you select Multiple Assignments, each work relationship of any type can include one or more assignments.

Creating the work relationship automatically creates one assignment. Additional assignments are optional; you create those manually.



Related Topics

Assignments: Explained

Work Relationships: Explained



Selecting the Employment Model: Critical Choices

By default, every enterprise uses the single-assignment employment model. To select a different employment model for the enterprise or for individual legal employers, use the Manage Enterprise HCM Information and Manage Legal Entity HCM Information tasks in the Setup and Maintenance work area respectively. This topic discusses the choices you can make and identifies any restrictions.

You can select a different employment model for individual legal employers.

Single Assignment v. Multiple Assignment

If you select:

- Single Assignment or Single Assignment with Contract, all work relationships in the enterprise or legal employer are restricted to a single assignment.
- Multiple Assignments, all work relationships in the enterprise or legal employer can include one or more assignments; therefore, work relationships can include a single assignment when appropriate.

Changing the Employment Model for the Enterprise or Legal Employer

In general, you can change the employment model for the enterprise or legal employer both during initial implementation and later. However, there are some restrictions on switching to and from particular employment models.

The following table identifies the valid and restricted switching options.

From	To Single Assignment	To Single Assignment with Contract	To Multiple Assignments
Single Assignment	N/A	See note	Yes
Single Assignment with Contract	See note	N/A	See note
Multiple Assignments	Yes	See note	N/A

Note: Yes, provided that no work relationships exist in the enterprise or legal employer.

Related Topics

Customizing Employment Pages: Points to Consider



Work Day Information: Explained

Work day information defines the standard working hours for each worker assignment in the enterprise or legal employer. Use the Manage Enterprise HCM Information and Manage Legal Entity HCM Information tasks in the Setup and Maintenance work area, to specify work day information at the enterprise and legal employer levels respectively.

Sources of Work Day Information

If you assign a schedule to the enterprise, legal employer, or department, work day information is taken automatically from that schedule. Otherwise, you can enter work day information for the enterprise, legal employer, and department.

You can also define work day information for positions. In any assignment, standard working hours are inherited from one of the following entities in this order of preference:

- 1. Position
- 2. Department
- 3. Legal employer
- 4. Enterprise

How Work Day Information Is Used

For assignment budgeting purposes, FTE is calculated automatically by dividing the assignment working hours by the standard working hours, which the assignment inherits from the position, department, legal employer, or enterprise. If standard working hours aren't available for any of these entities, then FTE can't be calculated. Although you can also enter FTE manually, automatic calculation of FTE is efficient for FTE reporting and promotes consistency among the various uses of FTE information.

Using Worker Numbers: Points to Consider

Every person record in the enterprise has a person number. You can also allocate worker numbers to employee and contingent worker work relationships. Worker numbers are optional: they are provided primarily for Oracle E-Business Suite customers who have used employee and contingent worker numbers and want to continue using them.

Enabling Worker Numbers

By default, worker numbers are not used. You can enable worker numbers at the enterprise and legal-employer levels using the Manage Enterprise HCM Information and Manage Legal Entity HCM Information tasks in the Setup and Maintenance work area respectively. If you enable worker numbers, each employee and contingent worker work relationship must have a worker number. If you do not enable worker numbers, they can't be used. If you enable the worker number at both the enterprise and legal employer levels, then the setting at the legal employer takes precedence.

Selecting the Number-Generation Method

Use the Manage Enterprise HCM Information task in the Setup and Maintenance work area, to select the number generation method for the enterprise. Worker numbers can be generated either manually or automatically.



If you select manual generation, you are recommended to define a numbering scheme to suit local requirements. For example, determine whether uniqueness within the enterprise or at the legal-employer level is important, and define the numbering scheme accordingly.

If you select automatic worker-number generation, numbers can be allocated from either an enterprise sequence or a legal employer sequence. If you use a legal-employer sequence, worker numbers are not guaranteed to be unique in the enterprise. When you use a legal-employer sequence, the worker number does not change if you rehire in the same legal employer. However, the worker number changes if you rehire in a different legal employer or globally transfer to a different legal employer.

If you use an enterprise sequence, the worker number does not change when you:

- Rehire in the same legal employer.
- Rehire in a different legal employer.
- · Globally transfer to a different legal employer.

Setting the Number-Generation Method for a Legal Employer

All legal employers automatically inherit the enterprise number-generation method if a method isn't specified at the legal employer level. You can override the number-generation method at the legal employer level by

- Selecting manual worker-number generation for a legal employer at any time.
- Selecting automatic worker-number generation for a legal employer, provided that no employee or contingent worker work relationships exist for that legal employer.

Use the Manage Legal Entity HCM Information task in the Setup and Maintenance work area, to select the number generation method for the legal employer.

Person Number Generation Methods: Explained

You can select one of the following person number generation methods for your enterprise on the Edit Enterprise page of the Manage Enterprise HCM Information task in the Setup and Maintenance work area:

- Manual
- Automatic prior to submission
- Automatic upon final save

Manual: You can use the Manual method to manually enter a person number when creating person records. You can update person numbers in the Manage Person page.

Automatic prior to submission: The Automatic prior to submission method automatically creates and displays person numbers when creating person records. This method is the default method for person number generation.

Note: The Automatic prior to submission method may create gaps in the person number sequence if the transaction is canceled after the person number is generated.

Automatic upon final save: The Automatic upon final save method creates person numbers only after the Add Person transaction is approved. You can't view the person number when creating the person record. However, you can view the person number on the Manage Person page after the transaction is approved. This method generates person numbers without gaps in the sequence.



Note: Person numbers are also assigned to contacts if they are created as a part of the Add Person transaction. For example, if a person is assigned person number 5 and two contacts are created during the Add Person transaction, then the contacts will be assigned person number 6 and 7. This means the next new person will be assigned person number 8.

The Automatic prior to submission and Automatic upon final save methods use an enterprise number sequence. By default, the sequence starts from 1; however, you can change the starting number. The person number increments by one for each new person record created.

You can change the person number generation method but you must be careful of the method that you select if you have existing data. You can change from Automatic prior to submission method to the Automatic upon final save method and vice versa. You can also change from the automatic method to the manual method and vice versa.

Initial Person Number

You can specify the initial person number for your enterprise when you generate person numbers automatically. The application uses this number for the first person record that you create using the automatic person number setting, and increments the number by one for subsequent person records. By default, the initial person number is 1.

Using the initial person number option, you can retain the legacy person numbers for existing persons. Additionally, you can automate the number generation for new persons, starting from the last legacy person number plus one. You can change the initial person number.

Person Numbers for Contact Records

Workers and contacts have the same number sequence when the generation method is Automatic. You can correct automatically generated person numbers for contacts on the Manage Person page if the person number generation method is Manual. If contacts are later hired as workers, they retain their original person numbers.

Related Topics

- What's the difference between person numbers and worker numbers?
- Worker Numbers: Explained

User and Role-Provisioning Setup: Critical Choices

This topic introduces the user and role-provisioning options, which control the default management of some user-account features. To set these options, perform the Manage Enterprise HCM Information task in the Setup and Maintenance work area. You can edit these values as necessary and specify an effective start date for changed values.

User Account Creation

The **User Account Creation** option controls:

- Whether user accounts are created automatically when you create a person, user, or party record
- The automatic provisioning of roles to users at account creation



This option may be of interest if:

- Some workers don't need access to Oracle Applications Cloud.
- Your existing provisioning infrastructure creates user accounts, and you plan to integrate it with Oracle Applications Cloud.

User Account Role Provisioning

Once a user account exists, users both acquire and lose roles as specified by current role-provisioning rules. For example, managers may provision roles to users manually, and the termination process may remove roles from users automatically. You can control role provisioning by setting the **User Account Role Provisioning** option.

Note: Roles that you provision to users directly on the Security Console aren't affected by this option.

User Account Maintenance

The **User Account Maintenance** option controls whether user accounts are suspended and reactivated automatically. By default, a user's account is suspended automatically when the user is terminated and reactivated automatically if the user is rehired.

User Account Creation for Terminated Workers

The **User Account Creation for Terminated Workers** option controls whether user-account requests for terminated workers are processed or suppressed. This option takes effect when you run the Send Pending LDAP Requests process.

Related Topics

- User Account Creation Option: Explained
- User Account Role Provisioning Option: Explained
- User Account Maintenance Option: Explained
- User Account Creation for Terminated Workers Option: Explained

FAQs for Organization Structures

What's a reporting establishment?

A reporting establishment is an organization that is used for statutory reporting other than tax and social insurance reporting. A reporting establishment has a parent-child relationship with a legal employer, with the legal employer being the parent organization. A legal employer can be the parent of multiple reporting establishments. You create reporting establishments using the Manage Legal Reporting Unit HCM Information task in the Setup and Maintenance work area.

In some countries, such as France, a reporting establishment can also be a tax reporting unit.



What's the difference between a job set and a job family?

A job family is a group of jobs that have different but related functions, qualifications, and titles. They are beneficial for reporting. You can define competencies for job families by associating them with model profiles.

A job set is an organizational partition of jobs. For example, a job set can include global jobs for use in all business units, or jobs for a specific country or line of business. When you select a job for a position or an assignment, you can view the available jobs in your business unit set and the common set.

Related Topics

· What's a job set?

What's the purpose of the legislative action attributes?

When you create transfer or termination related actions using the Manage Actions task in the Setup and Maintenance work area, you can also enter legislative attributes for the actions. You can use the attributes to:

- Indicate whether an action is transfer-related.
- Specify the termination type for termination-related actions.

For example, the termination-related action Resignation can have the termination type as voluntary and the action Reduction in Force can have the termination type as involuntary. Typically you enter this information to meet specific legislative requirements or for reporting purposes.

Can I delete an action or action reason?

No. If you no longer want users to select an action or action reason you can enter an end date, beyond which the action or reason is unavailable.

Can I create additional action types?

No. You can't create your own action types. You can associate the actions you create with the predefined action types, using the Manage Actions task in the Setup and Maintenance work area.

Can I delete an organization?

No you can't. However, you can disable an organization if it's no longer required. For example, if the enterprise is downsizing, then you can set the status of the organization to inactive. Changing the status of the organization disables the organization and the organization is no longer available to select.



How can I identify my organization in a report?

Use the organization manager information to enter a reporting name to help you identify an organization in a report. You use organization hierarchies for statutory, legal and management reporting.

Why can't I see my location in the search results?

You can search for approved locations only. Also, if you created a location in Oracle Fusion Trading Community Model, then you can't access that location from Oracle Fusion Global Human Resources. For use in Oracle Fusion HCM, you must recreate the location from the Manage Locations page.

How can I associate a location with an inventory organization?

From the Oracle Fusion Global Human Resources, go to the Manage Locations page. Use the Manage Locations task in the Workforce Structures work area.

To appear on the Create or Edit Location pages, your inventory organization must be effective on today's date and must exist in the location set that you selected.

What happens if I select an inventory organization when I am creating or editing a location?

The location is available for selection in purchase documents of that inventory organization in Oracle Fusion Inventory Management. If you don't select an inventory organization, then the location is available in purchase documents across all inventory organizations.

What happens if I select a geographic hierarchy node when I'm creating or editing a location?

The calendar events that you created for the geographic node start to apply for the location and may impact the availability of worker assignments at that location. You manage locations using the Manage Locations task in the Workforce Structures work area.

The geographical hierarchy nodes available for selection on the Locations page display from a predefined geographic hierarchy.

Related Topics

Worker Availability: How It Is Determined



What happens if the position that I selected in an assignment has no open headcount or FTE?

If the Overlap Allowed attribute is set to Yes in Edit Position page, then a warning is displayed and you can continue with the assignment. If the attribute is set to No, then you must select a different position as the number of incumbents for the selected position has already been reached.

How do I enable Position Incumbents validation?

The Position Incumbents validation prevents users from selecting a position in an assignment that doesn't have vacant Full Time Equivalents (FTEs) or headcount. If overlap of headcount is allowed at the position, then a warning is displayed if the open FTE or headcount is exceeded. If overlap isn't allowed, users can't continue unless they select a different position that has vacant FTE or headcount. This validation is available out of the box if users have installed Oracle Fusion HCM for the first time. If users are already using Oracle Fusion HCM and upgrading it, then you must enable the validation to use it. To enable the validation:

- 1. Select the predefined Position Incumbent Validation (ORA_PER_EMP_POS_INCUMBENT_VALIDATION) context in the Organization Information extensible flexfield to view the Apply Incumbent Validation attribute in the Manage Enterprise page.
- 2. Select the Apply Incumbent Validation attribute in the Position Incumbent Validation section in the Edit Enterprise page.

Related Topics

Managing Extensible Flexfields: Points to Consider

What happens to existing assignments when a position's attributes are changed?

If position synchronization is enabled for an enterprise or legal employer and you change a position's attributes, you can view all assignments that will inherit the change. After the changes are approved, all incumbents with active assignments automatically inherit the change, if they have set the Synchronize from Position option to Yes in the Assignments page.



8 Workforce Structures: Others

Define Grades

Grades: Explained

From the Manage Grades page, create grades to record the level of compensation for workers. You can:

- Create grades for multiple pay components, such as salary, bonus, and overtime rates
- Define one or more grades that are applicable for jobs and positions

This list of valid grades, combined with the settings for two profile options, enables you to restrict the grades that can be selected when you set up assignments for a worker.

Grades and Sets

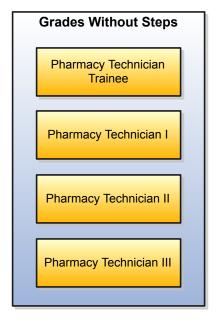
You assign each grade to a set. If you assign a grade to the common set, then the grade is available for use in all business units. To limit a grade to a single business unit, you can assign it to a set that is specific to that business unit.

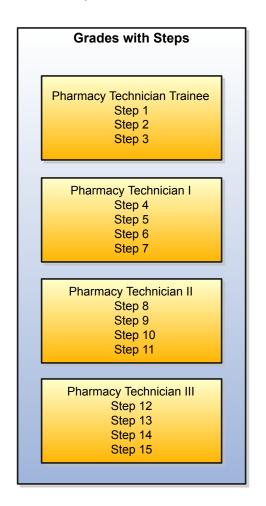
Grade Steps

Grade steps are distinct increments of progression within a grade. You can set up grades with or without grade steps.



The following figure illustrates the difference between grades with and without steps.





Grade Rates

Grade rate values are the compensation amounts associated with each grade. You can set up rates at the same time that you create grades, or set them up independently from grades.

For grades with steps, you set up the step rates when you include them in a grade ladder. Grade rates are optional.

Grade Ladders

You can combine grades into grade ladders to group your grades or grades with steps in the sequence in which your workers typically progress. For example, you might create three grade ladders for your enterprise: one for technical grades, another for management grades, and a third for administrative grades.

Related Topics

- Grades and Grade Rates: How They Work with Jobs, Positions, Assignments, Compensation, and Payroll
- Grades, Grade Rates, and Grade Ladders: Examples



Lookup Types for Grades: Explained

The Lookup type for Grades task identifies the lookup type for managing grades that has an extensible customization level.

The GRADE_PAY_RATE_TYPE lookup type identifies compensation components you want to set up for grade rates. The predefined values are salary, bonus, and overtime. Review these lookup values, and update them as appropriate to suit enterprise requirements.

Grade Rates: Explained

Grade rates contain the pay values that are related to each grade.

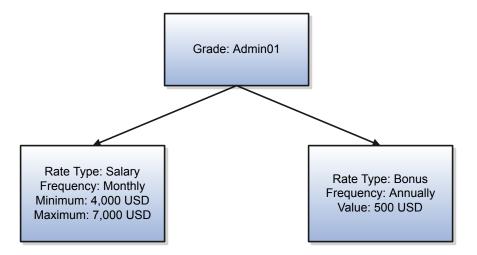
Grade rate values can be either a fixed amount or a range of values, and you can set up rates for different types of pay such as salary, overtime, and bonuses.

Note the following:

- Grade rates for some jobs or positions might include an hourly salary rate and an overtime rate.
- Grade rates for other jobs or positions might contain a salary rate type with a range of amounts and a bonus rate type with a fixed amount.
- Grade rates typically serve only as a guideline to validate that the salary you propose during the compensation process for a worker on a certain grade is appropriate for that grade.

This figure illustrates a grade that has two rate types associated with it:

- Salary rate type that has a range of values
- Bonus rate type with a fixed amount

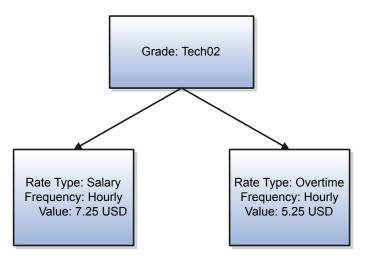


This figure illustrates a different grade that has two rate types associated with it:

Salary rate type that has a fixed amount



· Overtime rate type that also has a fixed amount



Rate Types

The types of rates that you can set up depend on the values for lookup type GRADE_PAY_RATE_TYPE. Examples of rate types are salary, bonus, and overtime pay.

Grade Rates and Legislative Data Groups

You assign a legislative data group to each grade rate. Depending on how your enterprise is configured, you may have several legislative data groups. You can set up grades that are shared across different areas of your business, and enter rates that are specific to each legislative data group.

Grade Rates and Grades

You can do the following:

- · Set up grade rates when you set up grades
- Set up grade rates independently from grades

For grades with steps, you enter rates when you attach the grades to a grade ladder.

Related Topics

- Grades and Grade Rates: How They Work with Jobs, Positions, Assignments, Compensation, and Payroll
- Grades, Grade Rates, and Grade Ladders: Examples

Grade Ladders: Explained

From the Manage Grade Ladders page, you create grade ladders to group grades and grades with steps in the sequence in which your workers typically progress.



Workforce Structures: Others

Grade ladders describe the grades and steps to which a worker is eligible to progress and compensation value associated with that grade and step. You may create different grade ladders for your enterprise: one for technical grades, another for management grades, and a third for administrative grades.

Ladders with Grades

You create ladders with grades by building a hierarchy of grades that were created without steps. When you set up this type of ladder, only grades without steps are available to add to the ladder. You can't create a grade ladder with a combination of both grades and grades with steps.

You don't define any grade rates when you set up a ladder with grades; the rates for the grades within the ladder are inherited from the rates that were added when you set up the grades. To add or edit rates for grades, you must use the Manage Grade Rates task.

Ladders with Grade Steps

You create ladders with grade steps using grades that were created with steps. When you set up this type of ladder, only grades with steps are available to add to the ladder.

You define step rates when you set up the ladder, and the rates are unique to each ladder. You can't share step rates between grade ladders.

Related Topics

Grades, Grade Rates, and Grade Ladders: Examples

Grades, Grade Rates, Sets, and Legislative Data Groups: How They Work Together

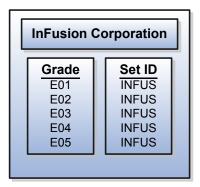
You assign grades to sets, and grade rates to legislative data groups from the Workforce Structures > Manage Grade Rates page.

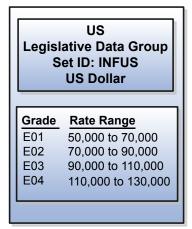
If you have grades that are common across multiple business units, you can:

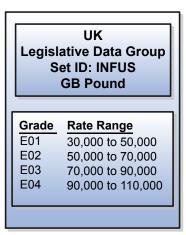
- Assign them to the set that's associated with business units.
- Set up grade rates that are specific to each legislative data group.

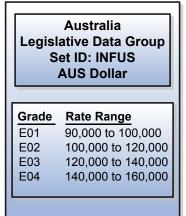


The following figure illustrates how you can use sets to share grades across multiple business units and change the grade rates for each legislative data group.









Grades and Sets

Sets enable you to share grades that are common across business units in your enterprise. You can assign grades to either a specific set or to the common set to each grade. If you assign the grade to the common set, then the grade is available for use in all business units.

Grade Rates and Legislative Data Groups

Grade rate values are associated with each component of compensation for your workers. While grades may be common across different areas of your enterprise, grade rates vary among the countries in which you employ people.

For example, if your enterprise has engineer jobs in the United States, the United Kingdom, and Australia, you can set up grades for a set that is shared between the countries, but set up different grade rates for each country in the applicable currency.



Setting Up Grade Ladders for Pay Scale Requirements: Worked Example

This example illustrates how to use a grade ladder to create a pay scale that's typical of technicians in the metal industry in Germany. The ladder includes four grades, and each grade includes four steps.

The following table summarizes key decisions for the grades, rates, and grade ladder in this scenario.

Decision to Consider	In This Example
Are steps required for the grades?	Yes.
Which step in each grade should be the ceiling step?	The last step in each grade.
What type of rates are necessary?	Salary rates only.
Will the ladder be created using grades or grades with steps?	Grades with steps.

Summary of the Tasks

To set up the pay scale, complete these tasks:

- Create grades
- Create a grade ladder

Creating Grades

- 1. In the Workforce Structures work area, click **Manage Grades** to open the Manage Grades page.
- 2. On the Manage Grades page, click **Create** to open the Create Grade: Grade Details page.
- 3. In the Grade Details region of the Create Grade: Grade Details page, complete the fields as shown in this table, using the default values unless otherwise indicated.

Field	Value
Grade Set	Common
Name	Technicians 03
Code	Tech03

- 4. Click **Next** to access the Create Grade: Grade Steps page.
- 5. In the Grade Steps region of the Create Grade: Grade Steps page, click Add Row.
- 6. Add four steps for the grade by completing the fields as shown in this table. You must click **Add Row** after adding each step.



Field	Value
Step Name	Year 1
Step Name	Year 2
Step Name	Year 3
Step Name	Year 4

- 7. Verify that Year 4 is the ceiling step.
- 8. Click Submit. You will add the grade rates when you create the grade ladder.
- 9. In the Warning dialog, click Yes.
- 10. In the Confirmation dialog, click **OK**.
- **11.** Repeat steps 2 through 9 to add three more grades with steps. Complete the information for each grade using the information in these tables. The ceiling step in each grade is Year 4.

Field	Grade 2	Grade 3	Grade 4
Grade Set	Common	Common	Common
Name	Technicians 04	Technicians 05	Technicians 06
Code	Tech04	Tech05	Tech06

Field	Value
Step Name	Year 1
Step Name	Year 2
Step Name	Year 3
Step Name	Year 4

Creating a Grade Ladder

- 1. In the Workforce Structures work area, click **Manage Grade Ladders** to open the Manage Grade Ladders page.
- 2. On the Manage Grade Ladders page, click **Create** to access the Create Grade Ladder: Grade Ladder Details page.
- 3. In the Grade Ladder Details region of the Create Grade Ladder: Grade Ladder Details page, complete the fields as shown in this table, using default values unless otherwise indicated.

Field	Value
Grade Set	Common



Field	Value
Name	Metal Technicians
Grade Type	Grade with steps

- 4. Click **Next** to access the Create Grade Ladder: Grades page.
- 5. In the Search Grades region of the Create Grade Ladder: Grades page, enter TECH in the **Code** field and click **Search**.
- 6. Select Tech03 and click Add to Grade Ladder.
- 7. Select Tech04 and click Add to Grade Ladder.
- 8. In the Add to Grade Ladder Hierarchy dialog, select **At the top** and click **OK**.
- 9. Select Tech05 and click Add to Grade Ladder.
- 10. In the Add to Grade Ladder Hierarchy dialog, select At the top and click OK.
- 11. Select Tech06 and click Add to Grade Ladder.
- 12. In the Add to Grade Ladder Hierarchy dialog, select **At the top** and click **OK**.
- **13.** Verify that the grades appear in numerical order, with Tech06 at the top of the ladder and Tech03 at the bottom of the ladder.
- 14. Click Next to access the Create Grade Ladder: Rate Values page.
- 15. On the Create Grade Ladder: Rate Values page, select the legislative data group for Germany.
- **16.** In the Grade Step Rates region, click **Add Row**.
- **17.** Complete the following fields as shown in this table.

Field	Value
Name	Technician Ladder Rates
Rate Type	Salary
Frequency	Monthly
Annualization Factor	12
Currency	EUR

18. In the Step Rate Values region, enter rates for the four steps in each grade by completing the fields as shown in this table.

Grade Name	Step Name	Value
Technicians 03	Step 1	1,750.73
Technicians 03	Step 2	1,878.90
Technicians 03	Step 3	2,009.79
Technicians 03	Step 4	2,143.92
Technicians 04	Step 1	2,238.57



Grade Name	Step Name	Value
Technicians 04	Step 2	2,408.39
Technicians 04	Step 3	2,577.68
Technicians 04	Step 4	2,744.81
Technicians 05	Step 1	2,831.87
Technicians 05	Step 2	3,047.14
Technicians 05	Step 3	3,257.52
Technicians 05	Step 4	3,469.00
Technicians 06	Step 1	3,586.36
Technicians 06	Step 2	3,851.38
Technicians 06	Step 3	4,122.34
Technicians 06	Step 4	2,143.92

- 19. Click Next.
- 20. On the Create Grade Ladder: Review page, review the grade ladder hierarchy and the rates, and click Submit.
- 21. In the Warning dialog, click Yes.
- 22. In the Confirmation dialog, click **OK**.

Related Topics

• Grades, Grade Rates, and Grade Ladders: Examples

Setting Up Grade Ladders for Spine Point Requirements: Example

This example illustrates how you can use grades, rates, and a grade ladder to represent spine points. You manage grade ladders using the Manage Grade Ladders task in the Workforce Structures work area.

Spine Points

Some public sector organizations in the United Kingdom (UK) use spine points to structure their grades. Each spine point corresponds to one or more steps within a grade, as grades often overlap each other.



Grade Structure

You can use grade ladders to meet the requirements of a grade structure with spine points. The following table illustrates a grade structure with spine points that is similar to the one used for university workers in the UK.

Spine Point	Salary	Gra	ade
1	25,674		1
2	26,361		
3	27,068		
4	27,796		
5	30,394		
6	31,778	2	
7	32,648		
8	33,542		
9	34,466		
10	35,425		
11	38,441		
12	39,510		3
13	40,634		
14	41,746		
15	42,914		
16	44,118		
17	45,358		

Analysis

To set up grades for the spine point structure, you must:

- Create three grades with steps and name each step using the spine point number.
- Create a grade ladder with all three grades.
- · Create step rates with annual salary amounts.



Resulting Grades, Rates, and Grade Ladder

The following table lists the grades and steps needed to meet the requirements of the grade structure with spine points.

Grade Name	Steps	Ceiling Step
Grade 1	 Spine Point 1 Spine Point 2 Spine Point 3 Spine Point 4 Spine Point 5 Spine Point 6 	Spine Point 5
Grade 2	 Spine Point 6 Spine Point 7 Spine Point 8 Spine Point 9 Spine Point 10 Spine Point 11 Spine Point 12 	Spine Point 11
Grade 3	 Spine Point 12 Spine Point 13 Spine Point 14 Spine Point 15 Spine Point 16 Spine Point 17 	Spine Point 17

The following table lists the grades, steps, and rates to add to the ladder.

Grade Name	Steps	Rates
Grade 1	Spine Point 1Spine Point 2	25, 67426, 631
	• Spine Point 3	• 27, 068
	Spine Point 4	• 27, 796
	 Spine Point 5 	• 30, 394
	 Spine Point 6 	• 31, 778
Grade 2	Spine Point 6	• 31,778
	Spine Point 7	• 32, 648
	 Spine Point 8 	• 33, 542
	 Spine Point 9 	• 34, 466
	 Spine Point 10 	• 35, 425
	 Spine Point 11 	• 38, 441
	• Spine Point 12	• 39, 510
Grade 3	Spine Point 12	• 39, 510
	 Spine Point 13 	• 40, 634
	 Spine Point 14 	• 41, 746
	 Spine Point 15 	• 42, 914
	 Spine Point 16 	• 44, 118
	Spine Point 17	• 45, 358



Related Topics

Grades, Grade Rates, and Grade Ladders: Examples

FAQs for Define Grades

Can I edit the legislative data group for a grade rate?

No. If you need to change the legislative data group for a grade rate, you must change the grade rate to inactive and create a new grade rate with the correct legislative data group.

How can I add rates to grade steps?

Rates can be added to a grade with steps, when you add the grade to a grade ladder.

Define Collective Agreements

Managing Collective Agreements: Explained

A collective agreement is a special type of commercial agreement which is negotiated collectively between the management (on behalf of the company) and trade unions (on behalf of employees). The collective agreement regulates the terms and conditions of employees in their workplace, their duties, and the duties of the employer. You manage collective agreements using the Manage Collective Agreements task in the Workforce Structures or Setup and Maintenance work areas.

Creating Collective Agreements

You can provide details of the parties negotiating the collective agreement, such as the employee and employer organizations. The employee organization can be the trade union or bargaining unit representing the employee while the employer organization is represented by the company management.

The details of a collective agreement are country-specific. The country value is mandatory for a collective agreement; however, you may enter the bargaining unit, legal employer, and union code values depending on the country. For example, you can create a collective agreement without the bargaining unit and legal employer, or only with the legal employer. When you select the value in the Country field, the values in the Bargaining Unit, Legal Employer, and Union Code fields are filtered to match the country selected. You can optionally attach documents to the collective agreement.

Validity dates determine the period for which the collective agreement is valid. If you specify a valid to date, the collective agreement lapses after the date, and you can't link it to an employee. However, employees to whom it's already linked aren't affected.

Note: If the collective agreement is linked to an assignment, you cannot edit the Identification Code, Country, Bargaining Unit, and Legal Employer fields. Additionally, you cannot delete the collective agreement.



FAQs for Define Collective Agreements

What's a collective agreement?

A special type of commercial agreement that is negotiated collectively between the management (on behalf of the company) and trade unions (on behalf of employees). The collective agreement regulates the terms and conditions of employees in their workplace, their duties, and the duties of the employer.

What's a bargaining unit?

A specific group of employees who are represented by one authorized union or association for purposes of collective bargaining.

Define Jobs and Positions

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 evaluation 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

- 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.

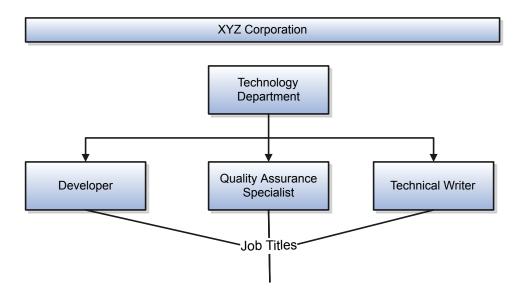
- Recently, three developers have left the company.
- The director decides to redirect the head count to other areas.
- Instead of hiring all three back into development, one person is hired to each department, quality assurance, and technical writing.

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.



Workforce Structures: Others

This figure illustrates the software industry job setup.



Positions: Examples

Positions are typically used by industries that use detailed approval rules, which perform detailed budgeting and maintain headcounts, or have high turnover rates.

Retail Industry

ABC Corporation has high turnovers. It loses approximately 5% of its cashiers monthly. The job of the cashier includes three positions: front line cashier, service desk cashier, and layaway cashier. Each job is cross-trained to take over another cashier's position. When one cashier leaves from any of the positions, another existing cashier from the front line, service desk or layaway can assist where needed. But to ensure short lines and customer satisfaction, ABC Corporation must replace each cashier lost to turnover. Since turnover is high in retail it's better for this industry to use positions.

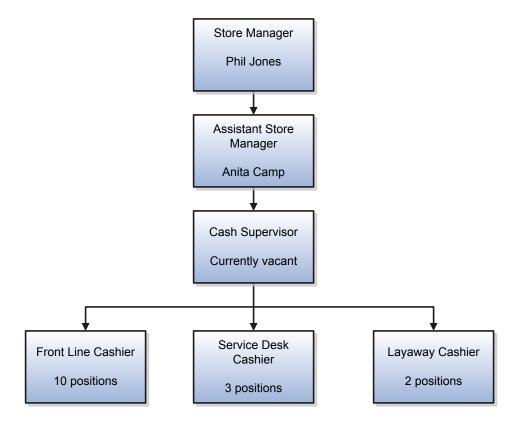
Note the following:

- An automatic vacancy is created when an employee terminates employment.
- The position exists even when there are no holders. Having the position continue to exist is important if the person who leaves the company is a manager or supervisor with direct reports.
- All direct reports continue reporting to the position even if the position is empty.
- You don't have to reassign these employees to another manager or supervisor. The replacement manager is assigned to the existing position.

Also, an added advantage to using Positions is when you hire somebody new, many of the attributes are inherited from the position. This speeds up the hiring process.



This figure illustrates the retail position setup.



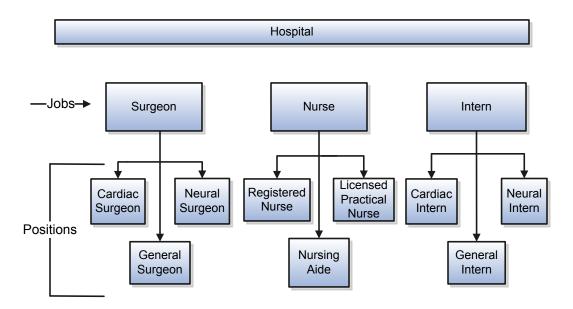
Health Care Industry

Health care is an industry that must regulate employment, roles, and compensation according to strict policies and procedures. Fixed roles tend to endure over time, surviving multiple incumbents. Industries that manage roles rather than individuals, where roles continue to exist after individuals leave, typically model the workforce using positions.

The hospital has a structured headcount and detailed budgeting. For example, a specific number of surgeons, nurses, and interns of various types are needed. These positions must be filled in order for the hospital to run smoothly. Use jobs and positions when you apply detailed headcount rules.



This figure illustrates the hospital position setup.



Job and Position Lookups: Explained

This topic identifies common lookups that are related tojob and positionfor which you can create new lookup values. Review the Job lookups, and update them as appropriate to suit enterprise requirements.

Job Lookups

The following table describes Job lookup types.

Lookup Type	Description
JOB_ FUNCTION_CODE	Describes the primary function of a job. Used for grouping and reporting jobs of like functions.
MANAGER_LEVEL	Describes the seniority of a manager.
EVAL_SYSTEM	Identifies the evaluation system used for the job or position.
EVAL_ SYSTEM_MEAS	Identifies the measurement unit for the evaluation criteria.

Position Lookups

The following table describes Position lookup types.

Lookup Type	Description
SECURITY_ CLEARANCE	Classifies if security clearance is needed.



Lookup Type	Description
EVAL_SYSTEM	Identifies the evaluation system used for the job or position.
EVAL_ SYSTEM_MEAS	Identifies the measurement unit for the evaluation criteria.
BARGAINING_ UNIT_CODE	Identifies a legally organized group of people which has the right to negotiate on all aspects of terms and conditions with employers or employer federations.
PROBATION_ PERIOD	Specifies the unit of measurement for the probation period of a position. For example, 365 Day, 52 Week, 12 Month, or 1 Year.

Related Topics

Lookups: Explained

Uploading Workforce Structures Using a Spreadsheet: Explained

Using a spreadsheet, you can upload multiple objects at a time, for the following workforce structures:

- Jobs
- Locations
- Departments

For example, to upload multiple jobs at a time:

- Select Manage Jobs in the Workforce Structures work area
- Display the Create menu
- Select Create in Spreadsheet

Uploading Using a Spreadsheet

For each workforce structure, you can do the following:

- Download a predefined spreadsheet template from the application
- Work on the spreadsheet offline, and upload the spreadsheet to the application when your changes are complete
- Upload the spreadsheet multiple times to accommodate revisions

Effective Start Date

Ensure that the effective start date of the workforce structure is same as or earlier than the hire date of persons associated with the workforce structure; for example, enter a job start date earlier than the hire date of persons associated with the job. You may want to consider creating all objects as of a common early date, for example, create all locations with the start date 1-1-1950.



Entering Descriptive Flexfield Values

Use the Attribute columns in the main sheet to enter values for the descriptive flexfields that are already defined for the object. Use the DFF Reference sheet to understand which attribute columns map to which descriptive flexfields, since this information is not displayed in the main sheet.

Note: You can't enter values in the DFF Reference sheet, you can only view details of the descriptive flexfields.

Uploading Jobs Using a Spreadsheet

When uploading jobs using a spreadsheet, you:

- · Can't create a new job profile
- · Can only associate an existing job profile
- Must enter the name of an existing job profile in the spreadsheet

Related Topics

• Using Desktop Integrated Excel Workbooks: Points to Consider

Position Synchronization: Explained

If position synchronization is enabled, assignments inherit specified values from the associated position.

Synchronized Attributes

You can select any of the following attributes for synchronization when position synchronization is enabled:

- Department
- Job
- Location
- Grade
- Grade Ladder
- Manager
- Full Time or Part Time
- Regular or Temporary
- FTE and Working Hours
- Start Time and End Time
- Probation Period
- Bargaining Unit
- Synchronize Mapped Flexfields

Position Changes

All active assignments that are synchronized from position automatically inherit changes from the position. Assignment attributes synchronized from position automatically inherit changes from the position. For those attributes not synchronized from position, you can either retain the existing values or update values from the position.



The Review page in the Edit Position page displays the list of impacted assignments with a status for each assignment. The

Assignment Changes

changes.

When you change the position in existing assignments you have a choice whether to inherit the values for those attributes which are not synchronized from the position. If you choose not to inherit, then the previous values remain unchanged.

status indicates if there are any issues due to the position change. You must correct all errors before submitting the position

Position Synchronization Configuration Changes

If the position synchronization configuration is changed after person and assignments are created, then the Synchronize Person Assignment from Position process must be run to apply the changes in assignments.

Position Hierarchy Configuration Changes

When the manager is synchronized from the HCM position hierarchy and you change the parent position, all assignments inherit the new manager from the current parent position. When you remove a position from the hierarchy, all child positions move one level up in the hierarchy. Hence, the grandparent position is the new parent position.

The incremental flattening process is triggered when you add or change a parent position. The flattening process will update the changes in the position hierarchy.

When you change the position in an existing assignment, the manager value is updated based on the parent position of the changed position. If the parent position doesn't have an incumbent, the incumbent in the position in the next level up in the hierarchy is the new manager.

Uploading Changes Using HCM Data Loader

When you create or update assignments using HCM Data Loader, you can synchronize them from positions. In this case, you must:

- Enable position synchronization before you load the assignments. If you enable it after the assignments are loaded, then you can synchronize from positions for current and future dates only.
- Set the Synchronize from Position (PositionOverrideFlag) attribute on the employment terms or assignment object to Y.

After loading the assignments, you must run the Synchronize Person Assignments from Position process to perform the synchronization. When you run the process, set the **Past Period to Be Considered in Days** parameter to an appropriate value. For example, if you set this parameter to 60 days, then any assignment records with start dates during the previous 60 days are synchronized from positions. By default, **Past Period to Be Considered in Days** is set to 30 days.

Related Topics

Inheritance of Assignment Values from Position: Explained

Setting Up Position Synchronization: Explained

Position synchronization is inheritance of values in an assignment from the values specified in the associated position. You can enable position synchronization at the enterprise and legal entity levels using the Manage Enterprise HCM Information and Manage Legal Entity HCM Information tasks (in the Setup and Maintenance work area) respectively.



Enterprise Level Setup

You can enable position synchronization either at the enterprise or the legal employer levels. Select the Enable Position Synchronization attribute in the Edit Enterprise page to enable position synchronization for the enterprise. By default, this attribute is deselected. You can also specify whether the inherited values can be overridden at the assignment level.

If you enable position synchronization at the legal entity and the enterprise levels, then the settings specified at the legal employer level takes precedence over the settings specified at the enterprise level.

Legal Employer Level Setup

Set the Enable Position Synchronization attribute to Yes in the Position Synchronization page to specify the attributes to be configured with the position for the legal employer.

Select No for the Enable Position Synchronization attribute, to exclude a specific legal employer.

You can also use the same settings as defined for the enterprise. In this case, you must select the Use Enterprise option, which is the default value. If position synchronization is configured only at the enterprise level, then the assignment inherits the attribute values from the position selected. You can also override these values at the assignment level.

HCM Position Hierarchy: Explained

Position hierarchy defines positions' relationships. The HCM position hierarchy is built based on these relationships. You enable the HCM position hierarchy on the Manage Enterprise HCM Information page in the Setup and Maintenance work area.

When you enable HCM position hierarchy:

- You can specify the parent position for a position on the Create and Edit Position pages in the Workforce Structures work area. When you search for positions based on a parent position, it will show all child positions for the specific parent position.
- You can also use the hierarchy to synchronize the line manager in the assignment from the line manager value in the parent position.
- You can view the positions that are part of the HCM position hierarchy on the My Team page and view the incumbents for a position.
- You can inactivate a position only if an incumbent with an inactive assignment exists.

Updating the Position Hierarchy

You can only correct the HCM position hierarchy. You can enable or disable the position hierarchy configuration by flattening the existing hierarchy. You must run the Synchronize Person Assignments from Position process to flatten the position hierarchy.

When the position hierarchy is flattened, then schedule to run the Synchronize Person Assignments from Position process. This will apply the manager changes in assignments if the position hierarchy is changed after person and assignments are created. The assignment changes can exist on the current date, date in the future, or in the past.

You can't change the position hierarchy configuration if the line manager is synchronized based on the HCM position hierarchy. However, if line manager synchronization was configured as of a date in the past, then you can correct the position hierarchy configuration.



Running the Synchronize Person Assignment from Position Process

To synchronize the position changes with the affected assignments, run the Synchronize Person Assignments from Position process. The Initialize Position Synchronization process to load position synchronization changes is incorporated into the Synchronize Person Assignments from Position process. Run the Synchronize Person Assignment from Position to:

- Update affected assignments in the enterprise or legal entity if position synchronization is enabled (either initially or later, as a change).
- Prevent data corruption
- Synchronize the line manager based on the HCM position hierarchy.
- Update assignments affected by the position changes, uploaded using HCM Data Loader.
- Note: You must schedule this process to run on a regular basis. If you are synchronizing the manager, then it's recommended to run this process daily.

Use the Schedule New Process page in the Scheduled Processes work area to run the Synchronize Person Assignment from Position process.

Before you run the process, you must enable position synchronization on the Manage Enterprise HCM Information or Manage Legal Entity HCM Information tasks in the Setup and Maintenance work area

Process Parameters

Past Period to Be Considered in Days

Number of days in the past to be considered for updating the attribute in the assignments. The default value is 30 days.

Run at Enterprise Level

Select **Yes** to run the process for the enterprise, or **No** to run it for a specific legal entity.

Legal Entity

Legal entity for which you want to run the process.

Process Results

This process updates all affected assignments with the changes from the position. This includes:

- Changes due to position synchronization.
- Past or future-dated changes to the position hierarchy.
- Rollback of line manager changes in assignments for reverse termination.
- Line manager hierarchy changes
- Flexfield-mapping changes.
- Changes in position loaded using HCM Data Loader (HDL)



Synchronizing Assignment Flexfields From Position Flexfields: Procedure

You map position flexfields with assignment flexfields using the Manage Assignment Flexfields Mapping task in the Functional Setup Manager.

Use the task to map assignment descriptive flexfield segments to position descriptive flexfield segments. Synchronizing mapped flexfields includes the following steps:

- 1. Define flexfield mapping
- 2. Enabling flexfield synchronization
- 3. Synchronizing assignment flexfields from position flexfields

Define Flexfield Mapping

To map flexfields, follow these steps.

- 1. In the Functional Setup Manager, click the **Manage Assignment Flexfields Mapping** task.
- 2. Specify the following information.

Field	Description
Source Context	The context for the position descriptive flexfield. If you want to map a global position flexfield segment, leave the source context blank
Source Segment	The position descriptive flexfield segment of the selected context or the global segment if the context was left blank
Destination Context	The context for the assignment descriptive flexfield you want to map the position flexfield to. If you want to map it to a global assignment flexfield segment, leave the destination context blank.
Destination Segment	The assignment descriptive flexfield segment of the selected assignment context or the global segment if the context was left blank.
Enterprise Configuration: Enable Position Synchronization	Specify whether you want to use this flexfield mapping for position synchronization for the enterprise. Leave this field blank if the flexfield mapping applies to a specific legal employer.
Legal Employer Configuration: Legal Employer	Use this option if the flexfield mapping doesn't apply to the enterprise. You can select multiple legal employers. Select the legal employer.
Legal Employer Configuration: Enable Position Synchronization	Specify whether you want to use this flexfield mapping for position synchronization for the selected legal employer.

- 3. Add more mappings as required and specify information described in step 2 for each row.
- 4. Save the mapping.



Enabling Flexfield Synchronization

To enable flexfield synchronization, follow these steps.

- In the Setup and Maintenance work area, click the Manage Enterprise HCM Information task to enable the setting for the enterprise, or click the Manage Legal Entity HCM Information task to enable the setting for a specific legal entity.
- 2. Click Edit and select Update.
- Select the Enable Position Synchronization and Synchronize Mapped Flexfields check boxes in the Position Synchronization Configuration section.
- 4. Click Submit.

Synchronizing Assignment Flexfields from Position Flexfields

To synchronize assignment flexfields from position flexfields, follow these steps.

- 1. In the Navigator, click Scheduled Processes.
- 2. Click Schedule New Process.
- 3. Run the Synchronize Person Assignments from Positions process..

Mapping Flexfields for Position Synchronization: Points to Consider

You map position descriptive flexfields to assignment descriptive flexfields using the Manage Assignment Flexfield Mapping task in Oracle Fusion Functional Setup Manager.

Use this mapping to automatically populate values for those assignment flexfields mapped to the position flexfields, when position synchronization is enabled. This topic describes what to consider when you're mapping flexfields.

Enterprise or Legal Entity Levels

Before you map flexfields, you must decide whether you want the mapping to be available for the enterprise or for specific legal entities only. You can reuse a mapping across different legal entities. Settings at the legal employer level takes precedence over enterprise settings, if both are specified.

Context Specific or Global

You must decide whether to map context specific or global flexfield segments because you can't map a context specific flexfield segment to a global flexfield segment. You can't map two or more segments of different contexts or multiple position segments to the same assignment segment.

When you change the position value in an assignment, all synchronized global segments inherit the value from the new position. You can manually update those segments that have a blank value in the position.

When you change the position value in an assignment, all context specific segments inherit the value from the new position. If the new position has similar values to the old position and additional contexts defined, the assignments retain the same values and inherit the additional values from the new position.

Selecting and removing a position in an assignment makes the context and segments editable but the current values aren't removed if they are synchronized from the position.

Numeric or Character

You can map flexfields of the same type (for example, numeric-to-numeric or character-to-character only), same precision, and the same value set (same value set ID).



Related Topics

Managing Descriptive Flexfields: Points to Consider

FAQs for Jobs and Positions

What happens if I select Synchronize Mapped Flexfields?

When you select this option, assignment flexfields are synchronized with the mapped position flexfields.

You must first map position flexfields to assignment flexfields using the Manage Assignment Flexfield Mapping task in the Functional Setup Manager, and then select this option in the Manage Enterprise HCM Information task. When position synchronization is enabled, the position flexfields are inherited in the assignments.

What happens if I specify a parent position?

You can specify a parent position when you enable HCM position hierarchy using the Manage Enterprise HCM Information task in the Setup and Maintenance work area. A parent position is one, which is the next position up in the position hierarchy.

On the Manage Positions page, click the parent position link to view the position details and click the icon next to the parent position to refresh the search with the parent position.

As a prerequisite, you specify a parent position to synchronize the line manager from the parent position. When you select to synchronize the line manager using the position hierarchy the incumbent in the parent position is populated as the new manager.

What happens if I specify the standard working hours in a position?

In an assignment, the standard working hours are inherited from the position. The working hours and the standard working hours provided in the position are used to calculate the FTE (Full Time Equivalent) in the assignment. If there is a FTE value already existing in the position, you can choose to update it based on the ratio of the working hours to standard working hours.

When position synchronization is enabled, even if FTE value exists for the position, it is not copied to the assignment during synchronization. Instead, the assignment FTE value is calculated as a ratio of working hours to standard working hours, if specified.

Related Topics

Work Day Information: Explained

Manage Trees

Oracle Fusion HCM Trees: Explained

Oracle Fusion trees are graphical representations of hierarchical data such as the structure of your organization. You manage trees in the Workforce Structures work area.

Oracle Fusion Human Capital Management (HCM) provides predefined tree structures for department, organization, position, and geography trees.



Note the following:

- You cannot change the predefined HCM tree structures.
- With the exception of geography trees, you can create multiple trees for each HCM tree type, and multiple versions
 of each tree.

For all HCM tree types, however, only one version of each tree can be active at one time.

Department Trees

Using the predefined tree structure for a department tree, you can create multiple department trees and then create multiple versions of each tree to build hierarchical representations of the departments within your organization. You can secure data by using department trees in an organization security profile.

Note the following:

- The top node of the tree is a department, and all of the child nodes are also departments.
- You can have only one top-level node for a department tree.
- You can't add a department as a node more than one time in the same tree version.

Organization Trees

If you use the Oracle Fusion Enterprise Structures Configurator to set up your enterprise structure, you can automatically create a default organization tree, with the following:

- Ultimate holding company as the first node
- Divisions and country holding companies as the second level
- Legal employers as the third level

You can modify the organization tree, and create additional organization trees. If you do not use the Enterprise Structures Configurator, you can create organization trees based on the predefined organization tree structure. In an organization tree, you can select any type of organization for the top node and for the child nodes, but have only one top-level node.

You can secure HCM data using an organization tree, to identify organizations in an organization security profile.

Position Trees

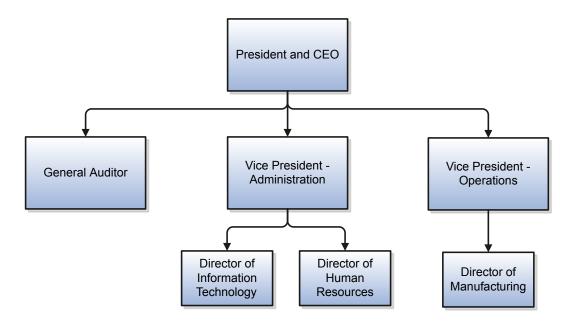
Using the predefined tree structure for a position tree, you can create multiple position trees and then create multiple versions of each tree to establish reporting relationships among positions. You can have only one top-level node for a position tree.

You can use position trees for the following purposes:

- Review position hierarchies for budgeting and organizational planning.
- Secure access to positions by identifying a position hierarchy in a position security profile. For example, you can
 create a position security profile that includes all positions in a position hierarchy below a specified top position. You
 can also include the position security profile in a person security profile to secure access to person records. In this
 case, the person security profile includes the person records of the people who occupy the positions in the position
 security profile.



The following figure illustrates a position hierarchy that you can establish using a position tree.



Geography Trees

Using the predefined geography tree structure, you create a version to represent the countries in which your enterprise operates. For each country, you can define lower-level nodes such as states, and cities. For example, United Kingdom - England - London. Although you can create multiple versions, you can create only one geography tree in the hierarchy. You can have only one top-level node for a geography tree.

You use the geography tree to specify the locations to which calendar events apply.

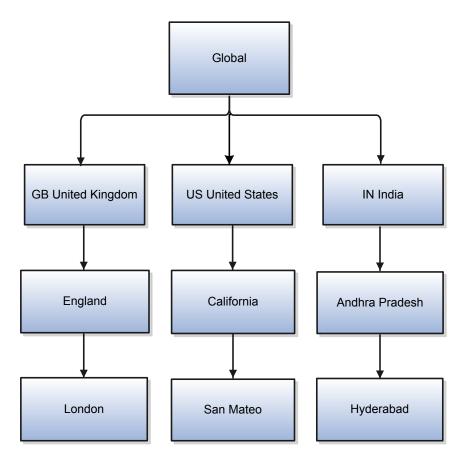
Note the following:

- If an event applies to your entire enterprise, then you can attach it to the top-level node in the tree. For example, Global.
- If an event applies only to specific countries in your enterprise, then you can attach it to the nodes for those specific countries. For example, United Kingdom.
- If an event applies only to specific states or cities in a country, then you can attach it to the state or city level nodes. For example, England, London.



Workforce Structures: Others

This figure illustrates the geographical hierarchy that you can establish using a geography tree.



Related Topics

- Setting Up a Geographic Tree and creating a Calendar Event: Worked Example
- How can I associate calendar events with countries?
- Managing Trees and Tree Versions: Points to Consider





9 Workforce Profiles

Profile Management: Explained

Profile management provides a framework for developing and managing talent profiles that meet your industry or organizational requirements. Profiles summarize the qualifications and skills of a person or a workforce structure such as a job or position.

Profiles are valuable for tracking workers' skills, competencies, and accomplishments, and for various talent management activities, such as career planning, identifying training needs, performance management, and in the recruitment process for identifying job requirements and suitable applicants.

This topic discusses:

- Profile search
- Profile comparison
- Best-fit analysis

Profile Search

You can search for worker, job, and position profiles based on certain criteria. For example, a Human Resource (HR) Specialist in London requiring to fill an Applications Developer position internally, can search for profiles of all workers who are based in London and have experience with Java and PL/SQL.

Profile Comparison

Use the **Compare** option in the Organization Chart tab on the person gallery to compare profiles You can compare profiles to determine next career moves or training needs for workers, and identify suitable candidates for jobs. For example, John is looking for his next career move He can compare his profile to that of a job to determine whether his competency ratings match the targeted competency ratings in a job profile. If his Teamwork rating is 3 and the rating requirement for the job is 4, he has a deficiency of -1. John and his manager can use this gap to drive development plans and other talent management-related functions.

Best-Fit Analysis

Use the best-fit analysis to determine the person profile that most closely matches a job profile and vice versa. For example, if you want to fill a Developer vacancy, and the job profile requires a B.S. degree in Computer Science, level 4 expertise in Java, and a rating of at least 3 in Teamwork, you can review an automatically-generated list of workers who most closely match this set of requirements. You can also use the best-fit analysis to find workers who are similar to a selected worker, or jobs that are similar to a selected job.

Related Topics

Comparing Items: Explained

Best Fit: How It's Calculated

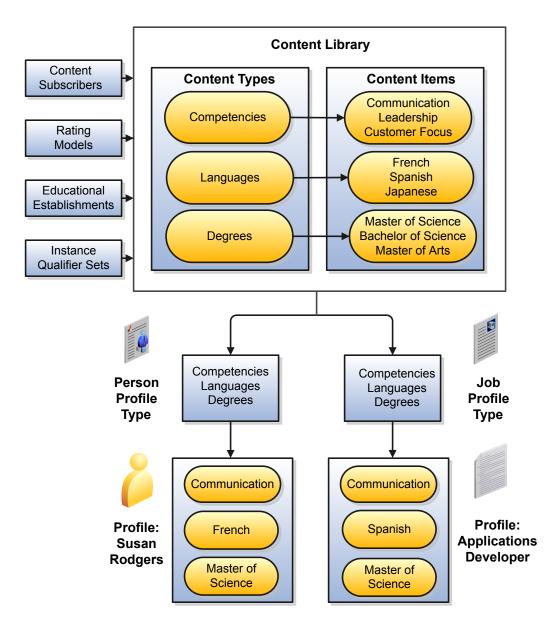
• Talent Profile Summary: Explained



Oracle Fusion Profile Management Components: How They Work Together

You can configure Oracle Fusion Profile Management to meet your business requirements using these components: the content library, profiles and profile types, content subscribers, educational establishments, instance qualifier sets, and rating models.

This figure illustrates how the components of Profile Management fit together.





Content Library

The content library provides the foundation for profiles as it stores both content types and content items.

Profile Types

Profile types are templates that you use to create profiles. Profile types determine:

- Whether the profile is for a person or for a workforce structure such as a job or a position.
- The content of the profile.

You select content types from the content library to create content sections for the profile type.

Profiles

You create person profiles for individual workers and model profiles for workforce structures, such as jobs or positions. The profile type that you select for the model profile determines the information that you complete for the profile. For example, a person profile might contain information about a person's education, language skills, competencies, and activities and interests. A job profile might contain information about the requirements for the job, such as competencies, language skills, degrees, or certifications.

Content Subscribers

Content subscribers are applications external to Profile Management that use content types.

Educational Establishments

You can define educational establishments to enable workers to add education information, such as degrees, to their profile.

Instance Qualifier Sets

You assign instance qualifiers to content types. Instance qualifier sets uniquely identify multiple instances of a content item on a profile. For example, if multiple people update a performance rating for a competency on a worker's profile, instance qualifiers provide a unique identifier to each instance of the competency. The unique identifier enables you to determine who provided each rating.

Rating Models

When you create content types in the content library, you can attach rating models to determine the scale for measuring performance and proficiency. You can also use rating models to measure the risk and impact of loss for workers, and to measure their potential.

Rating Models



Rating Models: Explained

Use rating models to rate workers on their performance and level of proficiency in the skills and qualities that are set up on the person profile. You can also use rating models to specify target proficiency levels for items on a model profile, so that the model profile can be compared to workers' profiles. Use the Manage Profile Rating Models task in the Profiles work area to create a rating model.

To rate workers on their performance and proficiency, attach rating models to the content types included in the person profile. Then you can rate workers on the items within the type. For example, you can rate workers on the Communication content item within the Competencies content type.

For model profiles, you can specify target proficiency levels for items on the profile, to compare model profiles with worker profiles. Using the ratings:

- Managers can compare a model profile to workers' profiles with and determine the best person suited to fill a
 position.
- Workers can compare their profile to model profiles to identify:
 - Suitable positions within the organization.
 - Skill gaps and fill the gaps before applying for other positions.

Rating models that measure workers' potential and the impact and risk of loss are also available.

Rating models can include some or all of the following components, depending on the use for the model:

- Rating levels
- Review points
- Rating categories
- Distributions

Rating Levels

Rating levels identify the qualitative values, such as 1, 2, 3, or 4, that you use to rate a worker.

For rating models that are used by Oracle Fusion Performance Management, you must:

- Define numeric ratings, particularly for rating models in performance documents that use calculated ratings.
- Define rating levels using whole numbers, with the highest number indicating the best rating. Rating levels determine high and low ratings in the analytics.

Review Points

Define review points for rating models in performance documents that use the average, sum, or band calculation method. The review points and point ranges that you define for the rating model are used to calculate ratings.

Rating Categories

Using rating categories you can group rating levels together for analysis tools used in the talent review process, such as the box chart that is used in the talent review process. You can group rating levels into categories such as low, medium, and high, and those categories then become the labels for the analytic. You should not change rating categories after setting them up, as the changes could affect the analytic.



Distributions

Oracle Fusion Compensation Management and Oracle Fusion Performance Management both use rating model distributions to determine the targeted minimum and maximum percentage of workers that should be given each rating level. Compensation Management uses the distribution values that you set up directly on rating models. However, you can set up distributions using the Manage Target Ratings Distribution task for rating models that are used in Performance Management.

Related Topics

- Performance and Potential Box Chart: Explained
- Performance Template Section: Critical Choices
- Performance Template Section Calculation Rules: Critical Choices
- Rating Model Distributions: Explained
- Selecting Box Chart Matrix Options for the Talent Review Template: Critical Choices

Updating Talent Ratings: Explained

Talent ratings are ratings that are used to evaluate a worker, including performance, potential, proficiency, readiness, and impact. Ratings are used in multiple products within the HCM product family such as Oracle Fusion Profile Management, Oracle Fusion Performance Management, and Oracle Fusion Talent Review.

Talent Rating Types

The following table displays the talent ratings and their descriptions. Depending on application settings and roles assigned, you can view, add, and update these talent ratings across multiple products within the HCM product family.

Talent Ratings	Description
Talent score	Evaluate a person's overall value to the organization using a rating model your organization defines.
Performance rating	Evaluate an item, section, or overall performance document.
Potential level	Evaluate a person based on the execution of the person's work.
Potential score	Evaluate a person's attainable level of excellence or ability to achieve success.
N box cell assignment	Evaluate a person's current contribution and potential contribution to the organization on a box chart matrix with N boxes. N represents the number of boxes in the grid.
Advancement readiness	Evaluate a person's readiness for the next position in their career development.
Risk of loss	Evaluate the likelihood of a person leaving the company.
Impact of loss	Evaluate the real or perceived effects on an organization when the person leaves.
Proficiency	Evaluate a person's skill level for a competency.



Talent Ratings	Description
Behavior ratings	Evaluate a person's actions for a behavior associated with a competency.

Updating Talent Ratings

You can update talent ratings depending on application settings and roles assigned to you. The following table shows where talent ratings can be updated.

Talent Ratings	Can Be Updated in Portrait?	Can Be Updated in Talent Review?	Can Be Updated in Performance Management?	Can Be Updated in Succession Management?
Talent score	Yes	Yes	No	No
Performance rating	Yes	Yes	Yes	No
Potential level	Yes	Yes	No	No
Potential score	Yes	Yes	No	No
N box cell assignment	No	Yes	No	No
Advancement readiness	Yes	No	No	No
Risk of loss	Yes	Yes	No	Yes
Impact of loss	Yes	Yes	No	Yes
Proficiency	Yes	No	Yes	No
Behavior ratings	Yes	No	No	No

When you update talent ratings:

- The performance rating on a performance document is always the one entered by the manager during a worker's performance evaluation. The performance rating from the worker's performance document is then displayed on the worker's profile when configured to do so in the performance template.
- In Oracle Fusion Compensation Management, if configured, you can also update the performance, goals section, and competencies section ratings, which appear in performance documents.
- The talent review process uses talent ratings on the worker's profile to build talent review information. When a talent review meeting concludes, a worker's profile is automatically updated with the calibrated ratings. Therefore, the performance rating displayed in a worker's performance document might be different from the one displayed in the worker's profile.

Related Topics

Performance Ratings: Points to Consider



· Customizing the Skills and Qualifications Page to View Talent Ratings: Procedure

Content Types and Content Items

Content Types: Explained

Content types are the skills, qualities, and qualifications that you want to track in talent profiles. The content library contains predefined content types such as competencies, languages, and degrees, but you can create custom content types as needed. You can also create free-form content types. Use the Manage Content Types task in the Profiles work area to create a custom content type.

Depending on your business requirements, you can use predefined content types or create custom content types. A predefined or custom content type, can be:

- Non free-form content type
- · Free-form content type

Non Free-Form Content Types

In addition to a code, name, and description, non free-form content types contain the following details:

- Properties: Represents the information that you want to capture for the content type. You define properties for a content type on the Field Properties tab on the Edit Content Type page.
 - Note: On the Field Properties tab, the values of the following fields are automatically generated and can't be edited:
 - Content Type ID
 - Content Item ID
 - Name
 - From Date
 - Content Supplier
- Relationships: Associations between content types, where one content type is a parent of another, or where one
 content type supports another. You define relationships for a content type on the Relationships tab on the Edit
 Content Type page. On the Relationships tab, the Proficiency Calculation Rule field is applicable for the Behaviors
 content type only. The value of this field is set to Average by default and can't be edited.

You can specify whether one content type is a parent of another, or whether one content type supports another. Content items inherit the relationship of associated content types. After you create a relationship, you can't delete it. You can only specify an end date for it so that the relationship is no longer applicable from the end date.

You can't create:

- Two kinds of relationships between two content types. For example, the content type A can't be both the parent and child of the content type B.
- A relationship between a content type and itself. For example, a content type can't be related to itself.



Subscribers: Codes that represent other Oracle Cloud products or applications that use content types. To use a
content type in an Oracle Cloud application, you must add the predefined subscriber code associated with the
application to the content type. Custom subscriber codes aren't supported. You add subscriber codes to a content
type on the Subscribers tab on the Edit Content Type page.

Examples of predefined non free-form content types are:

- Categories
- Competencies
- Components
- Degree
- Education Levels
- Goals
- Honors and Awards
- Languages
- · Licenses and Certifications
- Memberships
- N Box Cell Assignment
- Platforms
- Platform codes
- Product problem codes
- Technical Post Details

Free-Form Content Types

A free-form content type contains only a code, name, and a description, and does not have any properties defined for it until you add it to a profile type. Free-form content types do not include any content items.

Note: Free-form content types don't contain relationships or properties. You add properties for free-form content types when you add them to a profile type.

You can use free-form content types when you don't need a content item because the attribute captured for the content section is free-formed or less-structured. For example, you cant set up a free-form content type to store information for career-related information.

Examples of predefined free-form content types are:

- Accomplishments
- Advancement Readiness
- Areas of Study
- Career Preferences
- Career Potential
- Career Statement
- Criticality
- Enrollments
- Highest Education Level
- Learning



- Performance Rating
- Previous Employment
- Risk of Loss
- Special Projects
- Talent Score
- Work Requirements

Content Type Properties: Explained

Content type properties represent the information that you want to capture for a content type. Content items inherit the fields and field properties that you define for the content type to which the item belongs. Use the Manage Content Types task in the Profiles work area to create or edit a content type and define its properties. You view properties for a content type on the Field Properties tab on the Edit Content Type page.

You define properties for content types that aren't free-form. For free-form content types, the properties are defined when you add them as a content section to a profile type.

The values of the following content type properties for content types that aren't free-form content types are automatically generated for a profile item and should not be modified:

- CONTENT ITEM ID
- CONTENT_SUPPLIER_CODE
- CONTENT_TYPE_ID
- DATE FROM
- NAME
- Note: The **DATE_FROM** property stores the start date information of a content item within the content type. This field is used for maintaining the history of content items and isn't recommend to be displayed on the UI

Attributes of Content Type Properties

Each content type property has a field for which you set attributes. You determine attributes for each content type property that will be used for defining the relevant content items. The attributes that you can set for each content type property that you want to include for a content type are displayed in the following table.

Attribute	Description
Default Value	Value that appears by default for the property on the UI
Display	Determines if the property is editable, hidden, or display only for a content item
Label	Label for the property displayed on UI when the property is included within a content type
Required	Determines if the user is required to populate the field
Source	Name of the lookup type that provides values for the property. This attribute is specified for properties ITEM_TEXT_1 to ITEM_TEXT_10



Note: The **Field Name** attribute is a list of content type properties from which you select a content type property when adding the property to the content type, and then define attributes for the property.

Content Type Properties List

The following table describes a list of content type properties you can define for a non free-form content type. These properties appear on the Field Properties tab on the Edit Content Type page.

Content Type Property	Specifies
COUNTRY_ID	The country ID associated with the content item within the content type
ITEM_DATE_1 to ITEM_DATE_10	Any date. Use these fields to enter dates for profile items
ITEM_NUMBER_1 to ITEM_NUMBER_7	Any numeric data
ITEM_TEXT_1 to ITEM_TEXT_10	Data that requires selecting values from a list. Each field can store up to 30 characters of data. You provide values for ITEM_TEXT_1 to ITEM_TEXT_10 properties by specifying a lookup type for their Source attribute
ITEM_TEXT_11 to ITEM_TEXT_30	Nontranslatable data, such as a code or serial ID. Each field can store up to 30 characters of data
ITEM_TEXT_TL_1 to ITEM_TEXT_TL_5	Translatable data. Each field can store up to 240 characters of data
ITEM_TEXT_TL_6 to ITEM_TEXT_TL_10	Translatable data. Each field can store up to 2000 characters of data
ITEM_TEXT_TL_11 to ITEM_TEXT_TL_15	Translatable data. Each field can store up to 4000 characters of data
RATING_MODEL_ID	The rating model. The rating model you specify for a content type is also applicable for content items associated with the content type. However, for the content items added to the Competencies content type, the rating model selected for the Competencies content section takes precedence
STATE_PROVINCE_ID	The state ID associated with the content item within the content type

Content Subscribers: Explained

Content subscribers are codes that represent functional areas that use content types. You manage subscriber codes using the Manage Content Subscribers task in the Profiles work area.

To use a content type in a functional area, you must add the associated predefined subscriber code to the content type.

Example: You add a new custom content type Corporate Citizenship to the Person profile type. To view the content section for Corporate Citizenship in the Talent Profile work area, you must add the HRMS content subscriber code to the new content type.



Note: Custom subscriber codes aren't supported.

By default, the application provides predefined subscriber codes for:

- Oracle Fusion applications such as:
 - Talent Review
 - Succession Management
 - Performance Management
 - Network at Work
 - Project Resource Management
- Work areas within Oracle Fusion applications such as:
 - Person Management
 - Profiles
 - Note: Different subscriber codes are used to make content types available for job profiles and person profiles in the Profiles work area.
 - Talent Profile
 - Team Talent
 - Person Gallery
- Other Oracle Cloud applications such as Oracle Taleo Recruiting Cloud Service
- · Custom region in a portrait card

Predefined Subscriber Codes for Oracle Fusion Applications

To make a content type available within an Oracle Fusion application, you must add the associated predefined subscriber code to the content type.

The following table displays the predefined subscriber codes and the corresponding Oracle Fusion application where the subscribed content types are displayed.

Subscriber Code	Oracle Fusion Application	
HRTR	Talent Review	
SM	Succession Management	
HRA	Performance Management	
HRS	Network at Work	
RM	Project Resource Management	



Predefined Subscriber Codes for Work Areas

To make a content type available in a work area within the application, you must add the associated predefined subscriber code to the content type.

The following table displays the predefined subscriber codes, the corresponding work area where the subscribed content types are displayed, and the navigation to the work area.

Subscriber Code	Work Area	Navigation
HRMSSPC	Person Management	Select My Workforce then Person Management on the Home page.
HRMSSPC	Profiles (For person profiles)	 Select My Workforce then Profiles on the Home page. Select the Person Profiles tab, search for a person, and in the Search Results section, click the person name to view the person's profile on the Skills and Qualifications page.
тм	Profiles (For job profiles)	 Select My Workforce then Profiles on the Home page. Select the Model Profiles tab, search for a job, and in the Search Results section, click the job name to view the job profile.
HRMS	Talent Profile	 Select About Me then Talent Profile on the Home page. Select the Career Planning tab or the Skills and Qualifications tab to view your own profile.
HRMS	Team Talent	Select My Team then Team Talent on the Home page.
HRMS	Person Gallery	Select Directory then Person Gallery on the Home page.

Predefined Subscriber Codes for Other Cloud Applications

To make a content type available in Oracle Taleo Recruiting Cloud Service, you must add the predefined subscriber code **TALEO** to the content type.

Predefined Subscriber Codes for the Custom Region in a Portrait Card in the Person Gallery

Subscribers also include predefined codes for custom regions in Experience and Qualifications, Development and Growth, and Career Planning portrait cards. HR specialists can use these subscriber codes to display custom content in these cards, enabling them to capture additional information about employees.

The following table displays the predefined subscriber codes and the corresponding portrait card where the subscribed content types are displayed.



Note: These subscriber codes are applicable to portrait cards in the Person Gallery only.

Subscriber Code	Portrait Card
CPPR	Career Planning
DGPR	Development and Growth
EQPR	Experience and Qualifications

Content Type Relationships: Examples

You can associate content items of related content types with each other using content relationships. Use the Relationships tab on the Edit Content Type page to define content type relationships. The following scenarios illustrate the use of content type relationships.

Tracking Product Expertise

The Resource Manager component of Oracle Fusion Trading Community Model uses content type relationships to track the areas of expertise of workers. Using the predefined content type relationship where the Categories content type is a parent of Products, and Products is a parent of Components; resource managers can keep track of the categories, products, and components that they consider as areas of expertise for their resources.

Note: Because these content types and relationships apply only to the Resource Manager component of Oracle Fusion Trading Community Model, this product is the only predefined content subscriber to these content types.

Specifying Target Outcomes for Goals

Workers can manage their goals by associating their goals with target outcomes, which are content types such as Competencies and Memberships. You can set up a relationship on the Competencies content type where Competencies is supported by Goals. Workers can then set up goals that have a specific competency as a target outcome.

Content Items: Explained

Content items are the individual skills, qualities, and qualifications within the content types in the content library. For example, within the Competencies content type, communication is a content item. Use the Manage Content Items task in the Profiles work area to create content items that meet your business needs.

This topic discusses:

- Item properties
- · Related content items
- Proficiency descriptions



Item Properties

Content items inherit the fields and field properties that you define for the content type to which the item belongs. For example, one of the fields defined for the Memberships content type is ITEM_DESCRIPTION field. The attributes of this field are set up so that the label is Description, the field is editable, and the field doesn't require an entry. When you set up a content item for the Memberships content type, the application displays a field labeled Description, in which you can enter text to describe the agency, but the field isn't required.

Related Content Items

If the content type for which you are creating an item has related content types, then you can enter the related content items for the item. For example, if you have a content type relationship where the Goals content type supports the Competencies content type, then on the content items for competencies, you can enter the related goals.

Proficiency Descriptions

If the content item belongs to a content type that has a rating model defined for it, then you can either use the existing descriptions for the ratings within the model, or define descriptions for the ratings that are specific to the content item. When ratings exist for the content item, the descriptions defined for the item are used instead of those on the rating model.

Managing Approvals for Content Types: Explained

By default, any changes to a talent profile aren't subject to approval. When you edit a talent profile, all changes are visible immediately on the talent profile. HR specialists and implementors can enable approvals for each content type so that worker edits on the worker's talent profile require approval.

Content types are defined as content sections in profile types. You can enable approvals for a content section when you edit or create a profile type by using the Manage Profile Types task. You can open the task:

- In the Setup and Maintenance work area. To open the Setup and Maintenance work area, select **Navigator Setup** and **Maintenance**.
- In the Profiles work area. To open the Profiles work area, select Navigator My Workforce Profiles.

As an HR specialist or implementor, follow these steps to enable approval for a content section when you create or edit the person profile type on the Manage Profile Types page:

- 1. On the Content Sections tab, click the link to the content section.
- 2. Click the content section link in the Content Sections region to open the Content Section page.
- 3. Select the **Approval Required** check box to enable approval for that content section.
- 4. Click **OK** to save your changes.
- Note: You can enable approval for a content section added to only the Person profile type.

Related Topics

Managing Approval Rules: Explained



Creating Custom Content Types and Content Items: Worked Example

This example demonstrates how to set up a new custom content type and content items to track the corporate citizenship activities of your workers so that you can rate them on their involvement in the organization. This example also demonstrates how to set up a rating model to use with the content type and add the new content type to the person profile.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
Can a predefined rating model be used to rate corporate citizenship?	No. The predefined rating models don't have relevant rating descriptions.
Should the content type be a free-form content type?	No. Content items are needed, and the content should be stored in the content library.
What field and properties should the content type contain?	Add two fields to the content type:
	ITEM_TEXT_20RATING_MODEL_ID
	The ITEM_TEXT_20 field uses a label Comments to enter comments about the workers' corporate involvement. The RATING_MODEL_ID field uses a label Company Contribution to attach the rating model for corporate citizenship to the content type.
	Both fields should require entry and should be editable.
Does the content type need any content subscribers?	Yes. In order to be visible on the person profile, the new content type must be added to the HRMS content subscriber code.
What content items are needed to track the required information?	 Corporate social responsibility Corporate environmental responsibility Corporate industrial citizenship Corporate state citizenship Corporate borough, council, or municipal citizenship
When the content type is added to the person profile as a content section, what properties should the fields contain?	Both the Comments and the Company Contribution fields:
	Display in the detail view of the content sectionAre requiredMust be included in search results

To track corporate citizenship for your workers, complete the following tasks:

- · Create a rating model.
- Create a content type.
- Create content items.



Add the content type to the person profile type.

Creating a Rating Model

- 1. In the Setup and Maintenance work area, search for the **Manage Profile Rating Models** task and click **Go to Task**.
- 2. On the Manage Rating Models page, click **Create.**
- 3. On the Create Rating Model page, complete the following fields, as shown in this table. Use the default values except where indicated.

Field	Value	
Code	Citizenship	
Rating Name	Corporate Citizenship	
Description	Rating model for corporate citizenship	

4. On the Rating Levels tab, complete the following fields, as shown in this table.

Rating Level	Name	Short Description
1	Demonstrates limited or unused influence.	Limited
2	Demonstrates clear evidence of influence. Clear Evidence	
3	Provides a successful image of the company as socially responsible in limited environments.	Successful Image
4	Actively called upon to use influence as a corporate representative in selected environments.	Influential in Selected Environments
5	Demonstrates high level of influence and is able to operate effectively in all environments.	High Level of Influence

5. Click Save and Close.

Creating a Content Type

- 1. In the Setup and Maintenance work area, search for the **Manage Profile Content Types** task and click **Go to Task.**
- 2. On the Manage Content Types page, click Create.
- **3.** On the Create Content Type page, add a content type by completing the following fields, as shown in this table. Use the default values except where indicated.

Field	Value
Code	Citizenship



Field	Value	
Name	Corporate Citizenship	
Description	Ratings for corporate citizenship behaviors for workers.	

4. Set up the following field properties, as shown in this table. Use the default values except where indicated.

Field Name	Field Label	Required	Display Option
ITEM_TEXT_20	Comments	Selected	Editable
RATING_ MODEL_ID	Company Contribution	Selected	Editable

- 5. Click Save and Close.
- 6. On the Manage Content Types page, select the Corporate Citizenship content type and click Edit.
- 7. On the Edit Content Type page, select the **Subscribers** tab.
- 8. On the Subscribers tab, click Add.
- 9. In the Subscriber Code field, select **HRMS**.
- 10. Click Save and Close.

Creating Content Items

- 1. In the Setup and Maintenance work area, search for the **Manage Profile Content Items** task and click **Go to Task**.
- 2. On the Manage Content Items page, click Create.
- 3. In the Create Content Item dialog box, complete the following fields, as shown in this table.

Field	Value	
Content Type	Corporate Citizenship	
Content Item	Corporate Social Responsibility	

- **4.** On the Create Content Item: Corporate Social Responsibility page, select the **Corporate Citizenship** rating model in the **Rating** field.
- 5. Click Save and Close.
- **6.** Repeat steps 2 through 5 to add content items for Corporate Environmental Responsibility, Corporate Industrial Citizenship, Corporate State Citizenship, and Corporate Borough, Council, or Municipal Citizenship.

Adding the Corporate Citizenship Content Type to the Person Profile Type

- 1. In the Setup and Maintenance work area, search for the Manage Profile Types task and click Go to Task.
- 2. On the Manage Profile Types page, locate the Person profile type and click Edit.
- 3. On the Edit Profile Type: Person page, select the **Content Sections** tab.
- **4.** In the Content Sections region, click **Add Content Section**.
- **5.** In the Content Types dialog box, select **Citizenship**.
- **6.** In the Content Sections region, click **Citizenship**.
- 7. On the Content Section page, set up the following field properties, as shown in this table. Use the default values except where indicated.



Column Name	Display Flag	Required	Searchable
ITEM_TEXT240_1	Detail	Selected	Selected
RATING_LEVEL_ID1	Detail	Selected	Selected

- 8. On the Edit Profile Type: Person page, click Save and Close.
- 9. In the Content Access Section region, click Add.
- 10. In the Role field, select **Employee**.
- 11. Select the Update check box.
- 12. Click Add.
- 13. In the Role field, select Manager.
- 14. Click **OK**.
- 15. Click Add.
- **16.** In the Role field, select **HR Specialist**.
- 17. Click **OK**.
- 18. On the Edit Profile Type: Person page, click Save and Close.

Creating Free-Form Custom Content Types: Worked Example

This example demonstrates how to set up a free-form custom content type, add it to the HRMS content subscriber code, and then add the content type to the person profile type.

Your company wants to track the previous employment information for workers, including employer name, dates of employment, and job description. However, you don't want to set up and maintain content items for each employer, and this information applies only to person profiles. You decide to use a free-form content type for this information. You can set up the free-form content type with minimal information. Then when you add it to the person profile as a content section, you can define properties for employer name, dates of employment, and job description. Workers can complete their employment information on their profile based on how you set up the content section. The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
Must the content type be a free-form content type?	Yes. Content items aren't needed, and the content must not be stored in the content library.
Does the content type need any content subscribers?	Yes. In order to be visible on the person profile, the new content type must be added to the HRMS content subscriber code.
When the content type is added to the person profile as a content section, what fields are needed?	To capture the previous employer, a text field is needed. To capture employment dates, two date fields are needed. To capture job description, another text field is needed. Therefore, the following fields must be added: • ITEM_TEXT30_1 • ITEM_DATE_1 • ITEM_DATE_2 • ITEM_TEXT240_1



Decisions to Consider	In This Example
What properties are needed for the ITEM_TEXT30_1 field?	The field isn't required and the information isn't available as search criteria, so you must only set up these field properties as follows:
	 Label: Previous Employer Display: Detail (section must appear in detail view of profile)
What properties are needed for the ITEM_DATE_1 field?	The field isn't required and the information isn't available as search criteria, so you must only set up these field properties as follows:
	Label: From DateDisplay: Detail
What properties are needed for the ITEM_DATE_2 field?	The field isn't required and the information isn't available as search criteria, so you must only set up these field properties as follows:
	Label: To DateDisplay: Detail
What properties are needed for the ITEM_TEXT240_1 field?	The field isn't required and the information isn't available as search criteria, so you must only set up these field properties as follows:
	Label: Job DescriptionDisplay: Detail
What role access must be granted for the content section?	Employees, managers, and HR specialists must all have access to update the section.

To set up a free-form content type to track previous employment information for workers, you must:

- Set up a free-form content type
- Add the free-form content type to the person profile type

Setting Up a Free-Form Content Type

- 1. In the Setup and Maintenance work area, search for the **Manage Profile Content Types** task and click **Go to Task**.
- 2. On the Manage Content Types page, click Create.
- 3. On the Create Content Type page, complete the following fields, as shown in this table.

Field	Value
Code	PREVEMP
Name	Previous Employment
Description	Track previous employment information for workers.

- 4. Select the Free-Form Type check box.
- 5. Click Save and Close.
- 6. On the Manage Content Types page, select the Previous Employment content type and click Edit.



- 7. On the Edit Content Type page, select the **Subscribers** tab.
- 8. On the Subscribers tab, select HRMS in the Subscriber Code field.
- 9. Click Save and Close.

Adding the Free-Form Content Type to the Person Profile Type

- 1. In the Setup and Maintenance work area, search for the Manage Profile Types task and click Go to Task.
- 2. On the Manage Profile Types page, select the **Person** profile type, and click **Edit**.
- 3. On the Edit Profile Type: Person page, select the Content Sections tab and click Add Content Section.
- 4. In the Content Types dialog box, select the **Previous Employment** content type.
- 5. In the Content Sections region, click the **Previous Employment** content type and enter the following properties on the Content Section page, as shown in this table.

Column Name	Label	Display
ITEM_TEXT30_1	Previous Employer	Detail
ITEM_DATE_1	From Date	Detail
ITEM_DATE_2	To Date	Detail
ITEM_TEXT240_1	Job Description	Detail

- 6. In the Content Access Section region, click Add.
- 7. In the Role field, select **Employee**.
- 8. Select the Update check box.
- 9. Click Add.
- 10. In the Role field, select Manager.
- 11. Click OK.
- 12. Click Add.
- 13. In the Role field, select HR Specialist.
- 14. Click **OK**.
- 15. On the Edit Profile Type: Person page, click Save and Close.

Associating Behaviors with Competencies: Points to Consider

Behaviors are subcomponents of a competency. You must create a relationship between the Competencies and Behaviors content types so that you can associate their content items. You associate behaviors with competencies using the Relationships tab on the Edit Content Type page of the Behaviors or Competencies content type. Open the Edit Content Type page by using the:

- Manage Content Types task in the Profiles work area.
- Manage Profile Content Types task in the Setup and Maintenance work area.

The following features aren't available for the Behaviors content type:

- Print behaviors in the Talent Profile Summary report
- · Search for persons or competencies based on behaviors using the advanced search
- Upload behaviors content such as from a third-party vendor or HCM Data Loader



Support for using behaviors in other Oracle Fusion products

When associating behaviors with competencies, you must decide:

- The type of relationship between the Behaviors and Competencies content types
- The duration of each relationship
- Related content items

Deciding the Relationship

You can define the following relationships between the behavior and competencies content types:

- Parent and child relationship: You can define Behaviors as a child of the Competencies content type. Using this
 relationship, you define a hierarchy where Behavior content items are added to the Competencies content item.
 For example, when Behaviors is a child of Competencies, you can add the Behaviors content items to one or more
 Competencies content items. In this relationship, you must associate the same rating model with Competencies and
 associated Behaviors.
- Supports or supported by relationship: You can enable Behaviors to support the Competencies content type, and
 vice versa. The supported or supporting content items are not in a hierarchical relationship with one another. That
 is, each content item associated with a content type is independent of the content items of the other content type.
 Therefore, you can associate different rating models with each content type, and then add their content items to a
 profile and review them together.
- Note: The proficiency calculation rule is applicable for the Behaviors content type only. The value of the **Proficiency Calculation Rule** field on the Relationships tab on the Edit Content Type page for Behaviors is set to **Average** by default and can't be edited. Using this rule, the application calculates the proficiency rating for the competency as the average of the behavior ratings. The rating provided at the competency level is ignored by the application.

Deciding the Relationship Duration

You can define a duration for the relationship between the Behaviors and Competencies content types. There can be multiple relationships provided their dates don't overlap. You can delete a relationship only when the content type or its related content type is not added to any profiles (model or person). Once the content type or its related content type is added to a profile, you cannot delete the relationship. However, you can enter a To Date for the relationship to end it. You can also relate the content items of Competencies and Behaviors content types, and define the duration of the relationship between content items. Further, you can delete or end the relationship between content items.

Deciding the Related Content Items

After you establish the relationship between the Behaviors and Competencies content types; you must:

- 1. Create the content items for each content type.
- 2. Relate the content items between each content type. You relate a content item of a content type with content items of another content type using the Related Content Items tab. The tab is available on the Edit Content Item page. You open the Edit Content Item page by using the Manage Content Items task in the Profiles work area or Setup and Maintenance work area. On the Related Content Items tab, you can view the relationship type between the two content types. You can also decide the duration until when the content items are related with each other.

Talent Profiles



Profile Types: Explained

Profile types include person profile types and model profile types. Use the Manage Profile Types task in the Profiles or Setup and Maintenance work area to create a profile type.

Person Profile Types

The person profile type:

- Is the template that you use to create profiles of your workers or nonworkers.
- Contains the skills, qualities, and qualifications that you want to track for your workers.

Model Profile Types

The model profile type:

- Is a template for workforce structures such as jobs and positions. You can set up multiple model profile types.
 - Note: You must use the Job profile type to create profiles for jobs or positions.
- Identifies the targeted and required skills and qualifications for a job or position.
- Identifies work requirements, such as work schedule and travel frequency.

About Defining Profile Types

To define profile types, you first specify whether the profile type is a person or model profile. For model profiles, you also specify the workforce structures for which the model profile can be used. However, to create a position profile you must use the Job profile type as the template. To define the structure of the profile type, you add one or more content sections using content types from the content library and free-form content types. Define the following for each content section:

- Instance qualifier sets
- Section properties
- Role access
- Note: You access the Behaviors content section only after you select the Competencies content section on the Edit Profile Type page.

Instance Qualifier Sets

If you have defined instance qualifier sets for the content type, you select the instance qualifier set to use for the sections. You can't define instance qualifiers for the Behaviors content type.

Section Properties

The properties determine the fields and how they are displayed when you create profiles based on the type. For example, properties determine the label for the field, whether the field is required, and whether the field should be included in profile searches.

You define all of the properties for free-form content types.



Role Access

You can specify user roles such as Employee or Manager, which define who can view the content section, and who can update the section.

Effective Dates of Profiles

You can associate multiple profiles with a workforce structure. However, only one profile can be in effect at a time for the workforce structure. Therefore, the effective start and end dates of multiple profiles associated with a workforce structure must not overlap.

Related Topics

Model Profiles: Explained

Creating Job Profiles: Procedure

Creating Position Profiles: Procedure

Creating Person Profiles: Explained

The person profile is a profile type you create for individual workers. Person profile data, such as the skills, qualifications, accomplishments, and career preferences of a person, is displayed on Skills and Qualifications and Career Planning pages on a worker's person profile. HR specialists or implementors can create person profiles from the application, or implementors can upload them using tools such as HCM Data Loader.

The application provides the functionality to automatically create person profiles for person records. You can enable or disable this functionality using the **Autocreate Person Profiles** check box. By default, this check box is already selected. The **Autocreate Person Profiles** check box is available on the Edit Profile Type page of the person profile type. Use the Manage Profile Types task in the Profiles or Setup and Maintenance work area to edit the person profile type.

When the Autocreate Person Profiles check box is selected:

- The application automatically creates the person profile for that person when someone accesses the Skills and Qualifications page for a person.
- The person profile added for a pending worker is activated on the effective hire date for an employee or the effective placement date for a contingent worker.

If you choose to deselect the **Autocreate Person Profiles** check box for the person profile type and no profile exists for a person, the application displays an error message to create or upload profile when you access that person's Skills and Qualifications page. However, when uploading talent profile data from external sources, you must deselect the **Autocreate Person Profiles** check box to avoid duplication of person profiles.

Related Topics

- Person Records: Explained
- How can I hide an attribute on the person profile?



Uploading Talent Profile Data: Explained

Talent profile data is the person and job profiles data displayed on Skills and Qualifications and Career Planning pages. You access these pages for a worker in the worker's person spotlight. Examples of talent profile data include ratings and corresponding rating models, content items, and educational establishments. You can upload talent profile data for initial migration or mass data entry.

The following tools support upload of talent profile data:

- Oracle ADF Desktop Integration (ADFdi) workbook
- Oracle Fusion HCM Data Loader
- Oracle Fusion HCM Spreadsheet Data Loader
- Note: The tools available to you for uploading talent profile data depend on the setting of the HCM Data Loader Scope parameter. The ADFdi workbook isn't affected by the HCM Data Loader Scope parameter. You can continue to upload competencies using the ADFdi workbook regardless of the parameter setting.

For more information about:

- Uploading content items using an ADFdi workbook, see Uploading Competencies and Content Items into Oracle Fusion Profile Management (1453118.1) on My Oracle Support at https://support.oracle.com.
- All data loaders mentioned earlier, see Oracle Human Capital Management Cloud Integrating with Oracle HCM Cloud Guide.

Uploading Actions

The following table displays the type of talent profile data you typically upload and the actions you perform to load that data.

Note: Use the Open Competency Excel Template option to generate the ADFdi workbook for uploading competencies. The option is available on the Manage Content Items page in the Profiles work area.

Uploading Tool	Talent Profile Data Type	Actions
ADFdi workbook	Content item (only Competency)	CreateUpdate
HCM Data Loader	 Educational establishment Talent profile rating model Talent profile type (only Person and Job) Talent profile content item Talent profile content item relationship 	CreateUpdateDelete
HCM Spreadsheet Data Loader	 Educational establishment Talent profile rating model Talent profile type (only Person and Job) Talent profile content item Talent profile content item relationship 	CreateUpdate



Related Topics

• Using Desktop Integrated Excel Workbooks: Points to Consider

Adding Content to a Worker's Profile: Procedure

Depending on the content section access settings for HR specialists and managers, they can edit content or add it to a worker's profile. To view, add, or edit content of a worker's profile, they must use the worker's Skills and Qualifications page.

As an HR specialist, follow these steps to either edit the content or add it to the worker's profile:

- 1. Click My Workforce Profiles to open the Search: Profiles page.
- 2. Click the name of the worker in the Results section to open the Skills and Qualifications page of that worker.
 - ▼ Tip: Alternatively, use the Manage Talent Profile task in the Person Management work area to open a person's Skills and Qualifications page.
- 3. Click Edit on the Skills and Qualifications page to either edit the content, or add it to the worker's profile.

As a manager, follow these steps to either edit the content or add it to a report's profile:

- 1. Click My Team Team Talent.
- 2. Click a report's person card to open the Skills and Qualifications page for the report.
- 3. Click **Edit** on the Skills and Qualifications page to either edit the content, or add it to the report's profile.

Content Sections

Content Section Properties: Explained

Content types are referred to as content sections in profile types. Content section properties are attributes that are used to define data included in a profile. Use the Manage Profile Types task in the Profiles or Setup and Maintenance work area to select and edit a content section associated with a profile and define its properties. A free-form content type doesn't have any properties defined for it until you add it to the profile type as a content section. Therefore, you define all properties for free-form content types. You can change content section properties inherited from the content library and free-form content types as needed.

Attributes of Content Section Properties

The following table displays a list of attributes that you can set for each content section property that you included for a content section.

Attribute	Description
Default Value	Value that appears by default for the content section property on the profile
Display	Determines if the content section property is displayed on the profile. If yes, then whether the property is displayed on the content section summary, content section details area, or both



Attribute	Description
Label	Label for the content section property displayed on the profile when the property is included within a content section
Required	Determines if the user is required to enter a value for the property
Searchable	Determines if the content section property name must be included in profile searches
Value Set Name	Name of the lookup type or a predefined value set that provides values for the content section property. You specify a lookup type for properties ITEM_TEXT30_6 to ITEM_TEXT30_15 . The value set is already defined for a predefined content section property, if applicable. For custom content types, you can specify only a lookup type as the value for this attribute
View Attribute	Specifies the attribute in the predefined value set that provides the list of values for a content section property. You enter a value for this attribute only for predefined content section properties and when you mention a predefined value set in the Value Set Name attribute. The view attribute is already defined for a predefined content section property, if applicable. You can't use this attribute for custom content types

Note: The functionality associated with the **Searchable** attribute isn't available for use in the application.

Content Section Properties List

The following table describes a list of content section properties that appear on the pages with a profile item that belongs to the content section.

Content Section Property	Specifies
COUNTRY_ID	The country ID associated with the profile item. Ensure that the value of the Value Set Name attribute is CountryPVO and View Attribute attribute is GeographyName, where CountryPVO is the name of the value set and GeographyName is the attribute in the CountryPVO value set that provides a list of values for the COUNTRY_ID property
DATE_FROM	The start date information of a content section. This property is used for maintaining the history of profile items and isn't recommend to be displayed on the UI
DATE_TO	The end date information of a content section. This property is used for maintaining the history of profile items and isn't recommend to be displayed on the UI
ITEM_DATE_1 to ITEM_DATE_10	Any date. Use these properties to enter dates for profile items
ITEM_DECIMAL_1 to ITEM_DECIMAL_5	Numeric data that includes decimals. For example, price USD 2.99
ITEM_NUMBER_1 to ITEM_NUMBER_10	Numeric data that doesn't include decimals. For example, age 29 years
ITEM_TEXT30_1 to ITEM_TEXT30_5	Data that requires selecting values from a check box



Content Section Property	Specifies	
ITEM_TEXT30_6 to ITEM_TEXT30_15	Data that requires selecting values from a list. Ensure that the value of the Value Set Name attribute is a lookup type. For example, HRT_RISK_REASON is a lookup type for selecting risk of loss reasons	
ITEM_TEXT_240_1 to ITEM_TEXT_240_15	A simple text string, such as a name. Each property can store up to 240 characters of data. If the ITEM_TEXT_240_1 property is used in:	
	 A predefined free-form content type, you can't enter duplicate data for this property for a profile item 	
	 A custom free-form content type, you can enter duplicate data for this property for a profile item 	
	 A predefined or custom non free-form content type, you can't enter duplicate data for this property for a content item 	
ITEM_TEXT2000_1 to ITEM_TEXT2000_5	Long text data, such as a comment. Each property can store up to 2000 characters of data	
IMPORTANCE	The priority of the content section. The value of this property is used in the best-fit algorithm	
INTEREST_LEVEL	The level of interest. This property is added to the Competency content section. The value of this property is based on the Interest Rating Model and is automatically generated for a profile	
MANDATORY	Whether the item in a content type is required or not. This property is used by content types that are added to the Job profile type. Ensure that the value of the Value Set Name attribute is YES_NO . If added to a content type, the label for this property, is displayed as a check box column for content items within the content type for a job profile. The default label for this property is Required	
QUALIFIER_ID1 to QUALIFIER_ID2	The instance qualifier information assigned to the profile content section. To uniquely identify different instances of competencies, you must not modify the predefined value of the QUALIFIER_ID1 and QUALIFIER_ID2 properties for the Competency content section included in the Person profile type	
LAST_UPDATE_DATE	The last updated date of the content section. The value for this property is automatically generated for a profile	
RATING_LEVEL_ID1 to RATING_LEVEL_ID3	The rating level information of a profile content section	
RATING_MODEL_ID1 to RATING_MODEL_ID3	The rating model information of a profile content section. The RATING_MODEL_ID1 property is used for storing the rating model information for the Competencies content section associated with a job or person profile type. The default value for this property is Proficiency Rating Model	
STATE_PROVINCE_ID	The state ID associated with the profile item. This property is used in conjunction with the COUNTRY_ID property. Ensure that the value of the Value Set Name attribute is StateProvincePVO and View Attribute is GeographyName, where StateProvincePVO is the name of the value set and GeographyName is the attribute in the StateProvincePVO value set that provides a list of values for the STATE_PROVINCE_ID property	



Note:

- For content sections associated with free-form content types, the values of the properties
 CONTENT_TYPE_ID and DATE_FROM are automatically generated for a profile and should not be modified.
- For content sections associated with non free-form content types, the values of the properties
 CONTENT_TYPE_ID, CONTENT_ITEM_ID, and DATE_FROM are automatically generated for a profile and should not be modified.
- The **SOURCE_ID** property isn't used by the application and can be ignored.

Content Section Access: Explained

HR specialists or implementors manage the accessibility of the talent profile data that workers and managers enter for a content section of a profile type.

Implementors or HR specialists can access the content section related to a profile type by using the Manage Profile Types task. The task is available in the Setup and Maintenance, Profiles, or Person Management work area. They can manage accessibility for user roles: Employee, Line manager, HR specialist, and Matrix manager.

Follow these steps to control accessibility for the content section when you create or edit a profile type on the Manage Profile Types page:

- 1. On the Content Sections tab, click the link to the content section.
- 2. Click the content section link in the Content Sections region to open the Content Section page.
- 3. In the Content Section Access region, click Add.
- 4. Select the role to enable the users in that role to access the content section from the talent profile.
- 5. Select the **Update** check box for the role, to allow users in that role to edit the data.
- 6. Click **OK** to save your changes.
- Note: You decide the content section accessibility of the Behaviors content type by selecting the Competencies content type on the Edit Profile Type page. The content section access settings for the Behaviors content type must be same as the Competencies. To use behaviors in model profiles, you must set up the content section access for both Competencies and Behaviors.

Related Topics

Talent Profile Summary: Explained

Adding Common Lookup Types to a Content Section Property: Explained

Associate common lookup types with a content section property when defining content sections for a profile type. You can then provide a list of values for the content section property. For example, you can add a list of industries to a content section called Industry Expertise. Use the Manage Profile Types task from the Setup and Maintenance work area to add content sections and associate common lookup types with a content section property. You can use existing common lookup types, or create your own. Common lookups can be associated with these content section properties: ITEM_TEXT30_6 through ITEM_TEXT30_15.



Note: This functionality doesn't apply to these content section properties when they are associated with the following content sections: Career Preferences, Potential, Risk, Advancement Readiness, Career Statement, Talent Score, Performance Rating, and Work Requirements.

Related Topics

· Lookups: Explained

Adding a Common Lookup to a Content Section Property: Example

This example illustrates how to use common lookup types to create a list of values for a content section property.

Development Readiness

The Human Resource (HR) department at InFusion Corporation wants to track development readiness for employees using the person profile. They would also like to indicate whether a worker is a candidate for serving as a mentor to another worker.

Values for Development Readiness

The HR department has decided on three possible levels for a worker's development readiness:

- 1 to 2 years
- 3 to 5 years
- Ready Now

To indicate whether a worker is a candidate for being a mentor, they want three choices:

- Yes
- No
- Maybe

Analysis

InFusion analyzes the existing content types in the content library, and decides that none of the content types works. They must create a free-form content type called Development Readiness. The content type is free-form because content items aren't needed, and the information needn't be stored in the content library.

Next, they analyze the existing common lookups, and determine that they can use an existing lookup type, HRT_READINESS but add lookup codes and meanings to suit their needs. For the indicator for mentorship, they must create a common lookup.

After creating the content type and lookup and changing the lookup codes for HRT_READINESS, they must add the content type as a content section to the person profile. Adding the content section to the person profile enables HR Specialists and managers to add the section to workers' profiles. they can then rate workers on their readiness level and ability to be a mentor.

Note: You can attach lookup values to only these content section properties: ITEM_TEXT30_6 through ITEM_TEXT30_15.



Resulting Setup

To track development readiness for workers, InFusion must complete the following setup:

- 1. Using the Manage Common Lookups task in the Setup and Maintenance work area, locate the HRT_READINESS lookup type.
- 2. Add codes for 1 to 2 years, 3 to 4 years, and Ready Now.
- 3. Using the Manage Common Lookups task, create a common lookup called HRT_MENTOR, and add the three values of **Yes**, **No**, and **Maybe**.
- **4.** Using the Manage Content Types task in the Setup and Maintenance work area, create a free-form content type called Development Readiness. Add HRMS and TM as the content subscribers.
- 5. Using the Manage Profile Types task in the Setup and Maintenance work area, select the Person profile type and add Development Readiness to it.
- **6.** Using the Manage Profile Types task, select the Development Readiness content section to access the Content Section page.

Set up the content section by adding two properties as described in this table.

Property	Label	Display	Value Set Name
ITEM_TEXT30_6	Development Readiness	Summary	HRT_READINESS
ITEM_TEXT30_7	Potential Mentor	Summary	HRT_MENTOR

7. In the Content Section Access region on the Content Section page, add the HR Specialist and Manager roles. Select the option for each role to be able to edit the content section.

Note: Don't add the Employee role.

HR Specialists and managers can then access worker profiles and add the Development Readiness content section to the profiles.

Related Topics

Lookups: Explained

Instance Qualifier Sets: Explained

An instance qualifier set is a group of codes that uniquely identify different occurrences of the same profile item such as competency content section or a performance rating. Use the Manage Instance Qualifiers task in the Profiles work area to create an instance qualifier. You can't use any custom instance qualifiers.

Purpose

Instance qualifiers identify the role of a person or the application that updated a content type. For example, if a worker, the worker's peer, and the worker's manager all enter a rating for a competency on the worker's profile, instance qualifier sets uniquely identify each instance, or the rating given by each different role. Uniquely identifying different instances of competencies enables you to specify which instance is used when you view or compare profiles. Instance qualifiers also affect data entered for content types. For example, if configured, a worker with an employee profile can enter a competency with the **Evaluation Type** instance qualifier as **Self** only.



Properties

Each instance qualifier contains a code and a description, which indicate the role or the application that updated the content type.

The following examples list the instance qualifiers displayed on the UI or BI reports when the content type is updated by:

- An application: If an employee's potential rating is updated in a talent review meeting, the instance qualifier of the
 rating appears as TRPOTENTIAL in BI reports. Similarly, if the rating is updated on the employee's Career Planning
 page, the instance qualifier appears as PROFILEPOTENTIAL in BI reports.
- A role: If a competency is updated by an employee, the value of the Evaluation Type instance qualifier appears as Self on the employee's Edit Skills and Qualifications page and BI reports. Similarly, if the competency is updated by a manager, the value of the Evaluation Type qualifier appears as Supervisor.

Each instance qualifier has the following properties:

- Priority
- Employee and manager views
- Search ability
- Default instance qualifier for employee and manager

Priority

Priority determines:

- The order in which different instances of a competency are displayed.
- Which instance to use when searching and comparing profiles. The lowest number indicates the highest priority. The lowest number is displayed on the competency gap chart, comparison results for profiles, and best-fit results for a profile.

Employee and Manager Views

If the security privileges associated with employee and manager roles enables them to view or edit a content section, then you can use employee and manager views to determine which instances are visible to employees and to managers.

Search Ability

You can specify whether items that have been assigned the instance qualifier code should be included in profile searches. For example, you might not want the ratings for competencies given by peers to display when other workers are searching person profiles.

Default Instance Qualifier

You can specify the default instance qualifier to use when managers and employees update a competency. Each time an employee or manager updates a competency, the record is assigned the instance qualifier code that is identified as the employee or manager default code.

Questionnaires



Questionnaires: Explained

You can create questionnaires to gather information in applications that support them. For example, you can use questionnaires to collect participant feedback in a performance evaluation. This topic describes aspects of questionnaire creation and maintenance. Use the Manage Questionnaires, Manage Question Library, and Manage Questionnaire Templates tasks in the Setup and Maintenance work area.

Questionnaire Templates

All questionnaires are based on templates, which promote consistency. You can configure templates for:

- Specific applications
- General audiences, such as an entire organization or all internal customers
- Targeted audiences, such as particular roles (managers, for example)
- Specific purposes, such as providing feedback for performance evaluation periods or rate worker potential in an assessment for a talent review

Questionnaire Presentation

You can specify how the questionnaire appears in the subscriber application. For example, you can:

- Make the questionnaire single- or multiple-paged.
- Add sections to group questions by type or other classification.
- Mark questions as required.

Questions and Responses in the Question Library

You create questions in the question library. Four types of questions exist:

- Text
- Single Choice
- Multiple Choice
- No Response

For each question type, you also configure responses and select a presentation method. For example, for single-choice questions, you can specify that the possible responses appear either in a list or as radio buttons.

Questionnaire and Template Access

You can control access to questionnaires and templates by setting privacy options. If you set the **Privacy** option to **Private**, then only the named owner can edit the questionnaire or template. Otherwise, anyone with access can edit the questionnaire or template.

Related Topics

- Participant Feedback: Explained
- Using Questionnaires in Performance Documents: Explained



Questionnaire Templates: Explained

This topic describes how questionnaire template options affect questionnaires generated from the template. You can override some of these options in individual questionnaires.

Use the Manage Questionnaire Templates task in the Setup and Maintenance work area.

Section Presentation and Order

A questionnaire has at least one section. You can use sections to group questions by type or category, for example.

The **Section Presentation** option controls how the questionnaire uses sections. This table describes the Section Presentation values.

Value	Description
No Sections	One section appears that contains all questions.
Stack Regions	Multiple sections appear as specified on the Section Order option.

The Section Order option controls section order. This table describes the Section Order values.

Value	Description
Sequential	One section appears that contains all questions.
Random	Multiple sections appear as specified on the Section Order option.

You can specify whether questionnaires based on this template can override these values.

Question and Response Order

The **Default Question Order** and **Default Response Order** values control the default order of questions and responses in a section. Response order can vary for single-choice and multiple-choice questions only.

This table describes the Default Question Order and Default Response Order values.

Value	Description
Vertical	Questions appear in the specified order.
Random	Question order changes randomly whenever a user access the questionnaire.

You can override the default values of these options for individual sections. You can also specify whether questionnaires based on this template can override these values.



Allowed Response Types

The Allowed Response Types value identifies the response types that can appear in questionnaires created from the template. Only questions with the selected response types can appear.

For example:

- If you select neither Single Choice from List nor Radio Button List, then you can't include single-choice
 questions.
- If you select both **Radio Button List** and **Check Multiple Choices**, then you can include both single-choice and multiple-choice questions. However, each can use only the selected response type.

Section Format

The **Allow Additional Questions** option controls whether authorized users can add questions in the subscriber application. For example, for performance documents, that could be managers or workers.

If you select the **Required** option, then respondents must answer all questions in the section. Subscriber applications can override this setting.

If you select **New Page**, then the section starts a new page. A section may fill more than one page, depending on the number of questions specified in the **Maximum Number of Questions per Page** field.

Questions and Responses in Sections

In the Questions table, you manage questions for a selected section. You can:

- Add questions from the question library. You can change the response type for these questions.
- · Remove questions.
- Change question order using drag and drop. Questions appear in this order in the questionnaire if question order is
 Vertical for the section

If the section itself isn't required, then you can mark individual questions as required. Otherwise, respondents must answer all questions.

Questionnaire Question and Response Types: Explained

You can include text, single-choice, multiple-choice, and no response questions in questionnaires. This topic explains how to construct questions of each type and define the expected responses. Use the Manage Question Library task in the Setup and Maintenance work area.

Text Questions

Respondents enter their responses in a text field. For the response, you can specify:

- Both a minimum and a maximum number of characters.
- Either plain text or rich text. Select rich text to let respondents use formatting, such as bold and underline.

Single-Choice Questions

Respondents select one response from several. You specify whether the responses appear in a list or as radio buttons.

Respondents can select either from responses that you define or from a rating model. When you associate a rating model with the response type, possible responses come automatically from the rating model. For example, if the rating model



contains five rating levels, then the short description, name, and level for each level appear as responses from which the respondent can select.

Multiple-Choice Questions

Respondents can provide one or more answers. Specify whether the responses are presented as check boxes or a choice list. You can set both a minimum and maximum number of required responses. As for single-choice questions, you can associate a rating model with the response type.

No-Response Questions

Use this question type when no response is required. You can use it to add instructions or information to the section.

Attachments

For all types of guestions, including no-response questions, specify whether respondents can add attachments.

Creating a Questionnaire: Procedure

This topic summarizes how to create a questionnaire. Use the Manage Questionnaires task in the Setup and Maintenance work area. Select **Navigator** - **Tools** - **Setup and Maintenance**.

Selecting the Questionnaire Template

- 1. In the Search Results section of the Manage Questionnaires page, click Create. The Create Questionnaire dialog box opens.
- 2. Enter Questionnaire Template ID or Name values, if available. Alternatively, click Search to list all available templates.
- 3. In the Search Results section, select a template and click **OK**. The Create Questionnaire: Basic Information page opens.

Entering Questionnaire Basic Information

- 1. A unique numeric questionnaire ID appears automatically. You can overwrite this value.
- 2. Enter a questionnaire name and select a folder. Use folders to organize questionnaires by type or purpose, for example.
- 3. Leave the **Owner** field blank and the **Privacy** value set to **Public** if anyone who can access the questionnaire can edit it. Otherwise, select an owner and set **Privacy** to **Private**.
- **4.** In the **Subscriber** field, select an application to use the questionnaire, if appropriate. Other applications can't use the questionnaire if you select a subscriber.
- **5.** Leave the **Status** value set to **Draft** until the questionnaire is ready.
- **6.** In the **Instructions and Help Materials** section, enter and format any instructions for questionnaire users. This text appears at the top of page one of the questionnaire.
- Add file or URL attachments, if appropriate. Links appear at the top of the questionnaire and beneath any instruction text.
- 8. Click **Next**. The Create Questionnaire Contents page opens.

Entering Questionnaire Contents

The **Section Order**, **Section Presentation**, and **Page Layout** values are as specified in the questionnaire template. Depending on template settings, you may be able to change these values. Sections appear as defined in the questionnaire



template. Depending on template settings, you can edit some or all section settings. You can also delete predefined sections and create additional sections.

- 1. Select the first section to view its questions in the **Questions** section. You can delete a question or change its response type and **Required** setting.
- 2. If you create additional sections, you add questions to them. In the Questions section, click **Add** to open the Add Questions dialog box. Search for a question, select it, and click OK.
- 3. When all sections and questions are complete, click **Next** to open the Create Questionnaire Review page.
- 4. Click Preview to preview the questionnaire.
- 5. Click **OK** to close the Preview dialog box. Click **Save** to save your questionnaire.

Set the questionnaire **Status** value to **Active** when the questionnaire is ready for use.

FAQs for Workforce Profiles

What's a rating category?

A label for a grouping of rating levels. Rating categories are used in talent management processes such as performance management and talent reviews to group ratings for analysis tools (performance and potential box chart, for example.)

Why are some content type relationships not editable?

Predefined content type relationships aren't editable. You can only edit content type relationships that you define.

How can I define a relationship between the Goals content type and other content types?

Set up the relationship on the content type that you want to relate to goals using the relationship type: Is supported by. For example, to define a relationship between the Goals and the Competencies content types, set up the relationship on the Competencies content type, instead of the Goals content type.

What's a free-form content type?

Free-form content types enable you to capture information in a profile that you needn't store in the content library. For example, you can set up a free-form content type to store information about the previous employment information for your workers. Use the Manage Content Types task in the Profiles work area to create a free-form content type.

A free-form content type contains only a code, name, and a description, and doesn't have any properties until you add it to a profile type. Free-form content types don't include any content items.



Why can't I change the relationship type of a content item?

You can't change a content item's relationship type because it is derived from its content type. You can only change relationships at the content type level from the Edit Content Type page in the Profiles work area. You can't change predefined relationships.

How can I delete an attribute from the person profile?

You must have the HR specialist role to delete an attribute from the person profile.

Note: You can hide predefined attributes, but you cannot delete them.

To delete an attribute that is not a predefined attribute from the person profile:

- 1. Click Manage Profile Types on the Tasks tab in the Profiles work area.
- 2. Search for the Person profile type and select the row for the profile type in the Search Results section.
- 3. Click **Edit** in the Search Results section to open the Edit Profile Type page.
- 4. On the Content Sections tab, select the content section that includes the attribute you want to delete.
- 5. In the Content Sections region, click the selected content section link to open the Content Section page.
- 6. In the Content Properties section, select the row for the attribute and click **Delete**.

What happens if I edit a questionnaire that's in use?

You're prompted to either create a new questionnaire or update the existing version.

If you update the existing version, it replaces the current questionnaire. Respondents access the latest version wherever it appears. You can mark new sections and questions as required only if no one has yet responded to the questionnaire.

What happens if I enable custom approval rules for the person profile type?

HR specialists and implementors can enable custom approval rules for the person profile type:

- They can define approval rules for each content section related to the person profile type.
- When a worker submits changes for all approval-enabled content through the Edit Skills and Qualifications page of the worker's talent profile, notification is sent to approvers based on the default approval rules.

To enable the custom approval rules for the person profile type, select the Person profile type on the Manage Profile Types page and click **Edit**. You then select the **Enable Custom Approval Rules** check box on the Edit Profile Type page. For configuring approval rules for person profiles, use the Manage Approval Rules interface.

Related Topics

Managing Approval Rules: Explained



Can I edit skills and qualification data of a person's profile?

Yes. Depending on the content section access settings for your role, you can view and edit any of the predefined or custom content of a worker's profile.

How can I add content to my profile?

On the Home page, select **About Me - Talent Profile** to open the Skills and Qualifications page. Click **Edit** on the Skills and Qualifications page to edit or add the content to your profile. Depending on the content section access settings for your role, you can view and edit any of the predefined or custom content on your profile.

What happens if I don't add a label for a content section property?

If you don't enter a value in the **Label** field for a content section property, the application uses the value in the **Column**Name field as the default value. To open the Content Section page, click the Manage Profile Types task in the Profiles work area, click **Create** to create a profile type. Then on the Content Sections tab add a content section, and click the link to the added content section in the Content Sections region.



10 Notifications and Approvals

Notifications and Approvals: Overview

Approval management uses human workflow to automate tasks that are passed from a user or an application to another user or group for consideration or action. Workflows are routed in a predefined sequence to achieve an end result. Examples of tasks include approving a time card or completing an employee performance appraisal.

Approval management:

- Controls workflows for business processes such as hiring an employee or managing promotions.
- Enables you to define task routing policies that can be as simple or as complex as needed.
- Is fully integrated with HCM to derive approvers based on the supervisory hierarchy, areas of responsibility (such as HR or Benefit Representatives) and other criteria, such as job levels.

For workflows, Oracle Fusion Applications uses the approval management extensions of the human workflow services from Oracle Service-Oriented Architecture (SOA) Suite as well as the Oracle Business Process Management (BPM) Worklist application.

Oracle SOA Suite:

- Is a comprehensive software suite used to build, deploy, and manage service-oriented architectures.
- Provides a human workflow service that handles all interactions with users or groups in business processes.

For more information about using human workflow in SOA Suite, see Developing SOA Applications with Oracle SOA Suite.

Oracle BPM Worklist provides an interface for:

- Users to access tasks assigned to them and perform actions based on their roles in the workflow.
- Implementors to perform approval management setup, to define who should act on which types of transactions under what conditions.

For more information about working on tasks, see Managing and Monitoring Processes with Oracle Business Process Management.

Defining Approvals for Human Capital Management: Explained

You can manage approval policies using the tasks Manage Approval Transactions for Human Capital Management and Manage Task Configurations for Human Capital Management.



Managing Approval Transactions

Using the Manage Approval Transactions page, you can configure approval policies for many HCM tasks, including, but not limited to, the following:

- Hire
- Promote
- Transfer
- Terminate

You can select approvers for a task, arrange approvers in the required sequence, define approval rules for each approver, and configure conditions for each rule.

Managing Task Configurations

The Manage Task Configurations for Human Capital Management task navigates to the BPM Worklist. You can use the BPM Worklist to review and configure approval policies for HCM tasks; however, we recommend that you use the Manage Approval Transactions for Human Capital Management task. Using either UI, you can configure the following approval details:

- When to issue approval notifications
- Who can access task contents
- What actions are available to approvers
- What to do when errors occur during approval routing
- When tasks expire or when should tasks be escalated
- When approvers can add additional approvers
- Note: The HCM Simplified UI does not allow you to modify rules that were created using Advanced Mode in the BPM Worklist. If you originally created your rule conditions using Advanced Mode in the BPM Worklist, you must continue to use the BPM Worklist to make changes.

Approval Flow

Approval Management configuration options for Oracle Fusion Human Capital Management determine most of the actions that are available to the participants in the approval process. For example:

- Either approver can reject the transaction. By default, the approval process stops when the transaction is rejected.
- The second-level manager can push the transaction back to the first-level manager, who then has a second
 opportunity to review the transaction and either approve or reject it, as appropriate.
- Insertion of approvers in the approval list is permitted.
- Approvers can delegate their approval responsibilities to other approvers.

If you change the default settings of the Approval Management configuration options for a task, then different actions or action outcomes become available to this approval flow.



Managing HCM Approval Transactions: Explained

To manage approval transactions, use the Manage Approval Transactions for Human Capital Management task in the Setup and Maintenance work area.

You can search for approval transactions and perform the following actions on a transaction:

- Configure approval rules
- View the failed and pending processes
- Bypass approvals

Approval Rules Configuration

To view or configure the approval rules for a transaction, search for the transaction and click the Configure button in the Rules column in the search results. You can edit and save the approval rules in the Manage Approval Rules interface.

Failed and Pending Processes

An approval process may fail due to various reasons, for example, if there is a network or database outage or an issue in the approval rules setup. An approval process may also remain in a pending state waiting for approval. The Manage Approval Transactions page provides you information on whether a process has failed or is pending, and how many instances of the process have failed or are pending. You can drill down to each instance and view further details. For failed processes, you can view the error message generated in the application, and for pending processes, you can view the list of approvers. You can either withdraw a failed process or configure the approval rules and resubmit the process. If you withdraw the process, then the process is canceled and the user can begin the flow again.

Bypassing Approvals

The application automatically initiates the approval process upon submitting a transaction, if the transaction has approvals configured. You can override this behavior by enabling the Bypass Approvals option for the transaction. If you bypass approval for a transaction, the transaction is committed immediately upon submit and is not routed for approval.

Note:

When you submit a termination transaction, you can select the Deferred processing option to postpone processing the transaction until the termination date. This option is typically used in future-dated terminations. However, if you enable Bypass Approvals for the termination transaction, the Deferred processing option will not be available for selection.

Related Topics

Hiding Terminations: Critical Choices



Approval Management Configuration Options for Oracle Fusion Human Capital Management: Explained

Approval Management has the following default configuration options for all applications in the Oracle Fusion Human Capital Management family.

Configuration Option	Default Value	Effect of Default Value	
Ad hoc insertion of approvers	True	Ad hoc insertion of approvers in the approval list is allowed. Users who add approvers may also modify or remove the approvers that they add.	
Allow delegate	True	Approvers can delegate their approval responsibilities to other users. One approver replaces another, but the approver list is otherwise unaltered.	
Allow push back	True	An approver can push the transaction back to the previous approver, who thereby has a second opportunity to review the transaction.	
Allow reassign	True	Any approver can reassign the approval to a different approver. The approval list is recalculated based on the new approver.	
Allow request information	True	Approvers can request more information from another approver or the person who submitted the transaction.	
Allow self-approval	False	The person who submits the transaction can't approve it.	
Allow withdraw	True	The requester or an administrator can withdraw a transaction while the approval process is incomplete. Approvers who have already approved are notified of the withdrawal. The transaction is removed from the worklists of approvers who haven't yet approved.	
On error notify	Human Resources Application Administrator	A Human Resources Application Administrator is notified automatically when an error occurs.	
Period before task expires	None	Approval tasks don't expire.	
Period before task escalates	None	Approval tasks aren't escalated to other approvers.	



Configuration Option	Default Value	Effect of Default Value	
Escalated approver	None	Approval tasks aren't escalated to other approvers.	
Repeated approver frequency	Once per approval	An approver receives one notification per transaction, even when the approver appears multiple times in the approver list.	
Re-evaluate approver list	True	The approver list is regenerated after every response.	
Rejection outcome	Stop all	When an approver rejects a transaction, the approval process stops and the transaction is canceled.	

Managing Approval Rules: Explained

Use the Manage Approval Transactions for Human Capital Management task to configure approval policies for HCM tasks such as Hire or Promote. This interface works in conjunction with the BPM Worklist, but enables users to identify approvers and configure approval rules easily for some frequently performed HCM tasks.

Configuring Approval Policies

For a selected task, you can configure the approval policy by arranging approvers in the required order, defining approval rules for each approver, and submitting the approval policy. The approval policy takes effect immediately and supersedes the current approval policy for the selected task; however, in-progress approvals complete as expected and do not switch to the new policy.

Approvers

You can add the following types of approvers:

- Management Hierarchy or Supervisory Hierarchy
- Users
- Approval groups, which you define in BPM Worklist
- Position hierarchy
- Representatives, who are workers with assigned responsibilities, for example Benefits Representative
- Application role
- Job-level based line manager hierarchy
- Self auto approve



When to Use the BPM Worklist

Use the BPM Worklist to:

- · Configure notifications, including when notifications are issued
- · Configure process details, such as expiration and escalation policies
- Define approval groups
- Define approval rules in advanced mode

For any HCM tasks that are not available in the Manage Approval Transactions interface, you can use the BPM Worklist to configure all aspects of approvals. To configure in the BPM Worklist, use the Manage Task Configurations for Human Capital Management task.

Note: The HCM Simplified UI does not allow you to modify rules that were created using Advanced Mode in the BPM Worklist. If you originally created your rule conditions using Advanced Mode in the BPM Worklist, you must continue to use the BPM Worklist to make changes.

Approver Types: Explained

You can include any number of approvers of various types in your approval sequence by dragging and dropping them into the approval flow. This topic explains each of the approver types.

Management Hierarchy or Supervisory Hierarchy

You can include the following predefined types of managers in your approval sequence:

- Line manager
- Resource manager
- Project manager
- · Regional manager

If your enterprise defines additional types of managers, then they appear automatically in the Approvers section of the Manage Approval Rules page. You can include them in the approval sequence.

Users

You can include one or more Oracle Fusion Applications users in the approval sequence.

Approval Groups

You create approval groups using the BPM Worklist. When defining your approval sequence, you can enter the names of one or more existing approval groups.



Position Hierarchy

If you include a position hierarchy in your approval sequence, then position holders are invited to approve the transaction. For positions with more than one position holder, the transaction is approved by the first position holder to approve.

Responsibility Holders

You can include holders of the following predefined responsibilities in your approval sequence:

- Human Resources Representative
- Benefits Representative
- Union Representative
- Payroll Representative

If your enterprise defines additional responsibility types, then they appear automatically in the Approvers section of the Manage Approval Rules page. You can include them in the approval sequence.

Human Resource (HR) Specialists assign responsibilities to workers using the Manage Areas of Responsibility task. A worker becomes an approver for a transaction if he or she has that responsibility for the transaction subject. For example, if you specify the Benefits Representative as an approver for a promotion, then the Benefits Representative of the worker who is being promoted is invited to approve the promotion.

Note: If you use a responsibility holder, then ensure that responsibility holders are already defined in the application. For example, if you include a HR representative as an approver for an employee process, then all employees must have HR representatives assigned to them.

Application Roles

You can use any of the existing duty roles to include in your approval sequence. If your enterprise defines duty roles for security purposes, then you can enter the duty role to include them in the approval sequence. Users with job or data roles that inherit the duty role become transaction approvers.

Job Level

You can include a job level in your approval sequence.

Job level routings are based on the manager hierarchy defined in Oracle Fusion Human Capital Management. The approval list is generated based on the starting level specified in a rule and continues until an approver with a sufficient job level is found. The approval flow uses the job level defined in the Manage Jobs interface.

Related Topics

Areas of Responsibility: Explained

HCM Approval Rules: Explained

Using the Manage Approval Transactions for Human Capital Management task, you can specify one or more approval rules for each task. To create more than one approval rule, you either add a rule or duplicate a selected rule and edit it as



appropriate. When you create multiple approval rules for a task, they are evaluated in the order of the rule's priorities. When the priorities are the same for different rules, they are executed in an undefined order, sequentially.

Approval rules comprise one or more IF statements and one or more THEN statements.

IF Statements (Conditions)

IF statements are tests that determine when an approval rule takes effect. For example, you could specify that an approval rule for a promotion takes effect when the worker's department is Sales or the worker's job is Area Manager.

You can specify multiple IF statements. If you join multiple statements with "AND" operators, then all statements must be true before the approval rule takes effect. If you join multiple statements with "OR" operators, then at least one of the statements must be true before the approval rule takes effect.

THEN Statements (Actions)

THEN statements specify:

- Who the approvers are
- What actions approvers can take

The following table summarizes the approval actions.

Description		
Notifications are issued to the identified approvers and their response is required.		
No notifications are issued to the identified approvers. The transaction is either approved or rejected automatically, and the approvers are recorded as having approved or rejected the transaction. The value of the Set Outcome To attribute for manager hierarchies determines whether the transaction is approved or rejected.		
Notifications are issued to the identified approvers, but no response is expected.		

Management Hierarchy Approval-Rule Attributes

When you define approval policies using the Manage Approval Transactions for Human Capital Management task, you can create one or more approval rules for manager hierarchies of predefined and locally defined types. This topic describes the values that you can specify in the THEN statements of approval rules for manager hierarchies.

Attributes

The following table summarizes the attributes of the manager-hierarchy approval rules and their default values.

Attribute Name	Description	Values	Default Value
Action Type	Allows users to choose from Approval required (participants need to act on the transaction),	Approval requiredInformation only	Approval required



Attribute Name	Description	Values	Default Value
	Information only (participants get FYI notifications), and Automatic approval (participants do not need to act, transaction is auto approved).	Automatic approval	
Route Using	Allows users to choose which manager to route through.	 Resource manager Line manager Project manager Regional manager Custom Manager Types 	Line Manager
Approval Chain of	Allows users to choose which approval chain to use.	 Requester User Worker Worker's Current Line Manager Worker's Proposed Line Manager 	Requester
Start With Changed from Initial Approver	 Identifies both the first approver and the manager hierarchy. By default, approval requests are sent to the requester's first-level manager, and the manager hierarchy is the one associated with the requester's primary assignment. The requester is the worker who submits the transaction. If you select a user in Approval Chain of, then the manager hierarchy is the one associated with that user's primary assignment. For example, when promoting one of your direct reports you could select as initial approver a human resource (HR) specialist who is outside your manager hierarchy; approval requests from this rule would be directed to the manager hierarchy of the HR specialist's primary assignment. If you select a user who is not a manager, then the rule fails. 	Manager Employee Second Level Manager	Manager
Number of Levels	Controls how far up the selected manager hierarchy approval	Worker's Current Line Manager1 or higher	1



Attribute Name	requests are sent. The first level is based on the Start With value. Approval routing stops when either the number of levels or the topmost approver is reached, whichever occurs first.	Values	Default Value
Top Approver	 Specifies an approver above whom approvals are not routed. Approval routing stops when either the number of levels or the topmost approver is reached, whichever occurs first. 	 Worker Worker's Proposed Line Manager Requester User Manager Second Level Manager 	 Manager
	 For the top approver value, you can select: A different manager (first-level or second-level, as appropriate). A user who is a manager from the same manager hierarchy as the initial approver. If you select a user who is not a manager or is from a different manager hierarchy from the initial approver, then the topmost approver is not found. In this case, routing of approvals stops when the number-of-levels value is reached. 		
Set Outcome ToThis only renders when Action Type is set to Automatic approval.	Specifies the outcome for automatic approvals. If you set this value to Approve , then all identified approvers are recorded as having approved the transaction, even though the approval is automatic. Similarly, if you set this value to Reject , then all identified approvers are recorded as having rejected the transaction.	ApproveReject	None



Position Hierarchy Approval-Rule Attributes

When you define approval policies using the Manage Approval Transactions for Human Capital Management task, you can create one or more approval rules for a specified position hierarchy.

Attributes

The following table summarizes the attributes of the position-hierarchy approval rules and their default values.

Attribute Name	Description	Values	Default Value
Action Type	Allows users to choose from Approval required (participants need to act on the transaction), Information only (participants get FYI notifications), and Automatic approval (participants do not need to act, transaction is auto approved).	Approval requiredInformation onlyAutomatic approval	Approval required
Job Level	 The number of job levels. Approvals are routed to approvers between the initial and topmost approvers in the position hierarchy based on this value. You can specify the job levels as absolute values (for example, a minimum of 2 and a maximum of 4). Alternatively, you can specify the values relative to either the initial approver or the requester. The requester is the person who submits the transaction. Approval routing stops when either the number of job levels or the topmost approver is reached, whichever is sooner. 	Minimum and maximum values relative to: Initial approver Requester Absolute minimum and maximum values	At most 1 relative to initial approver At least 1 relative to initial approver
Position Hierarchy	 The name of the position hierarchy You can select from all position hierarchies in the enterprise 	All position hierarchies in the enterprise	None
Starting PositionChanged from Initial Approver	 The position of the first approver The approval notification is sent to all workers who have the position, and the 	All positions in the selected position hierarchy	None



Attribute Name	Description	Values	Default Value
	transaction is approved by the first worker to approve		
Job Level	 The number of job levels. Approvals are routed to approvers between the initial and topmost approvers in the position hierarchy based on this value. You can specify the job levels as absolute values (for example, a minimum of 2 and a maximum of 4). Alternatively, you can specify the values relative to either the initial approver or the requester. The requester is the person who submits the transaction. Approval routing stops when either the number of job levels or the topmost approver is reached, whichever is sooner. 	Minimum and maximum values relative to: Initial approver Requester Absolute minimum and maximum values	At most 1 relative to initial approver At least 1 relative to initial approver
Top Position	 The position of the topmost approver The approval notification is sent to all workers who have the position, and the transaction is approved by the first worker to approve Approval routing stops when either the number of levels or the topmost approver is reached, whichever is sooner 	All positions in the selected position hierarchy	None
Include	Allows users to choose which approvers to include.	All ApproversFirst and last approversLast approver only	All approvers

Defining an HCM Approval Policy: Worked Example

This example shows how to define an approval policy for employee hires in the Sales department using the Manage Approval Transactions for Human Capital Management task.

If the Department of the new hire is Sales, approvals should route to the first level line manager of the requester and FYI only to the HR Representative of the worker.



If the Department of the new hire is Finance, approvals should route to the second level line manager of the requester and FYI only to the HR Representative of the worker.

The following table summarizes key decisions for this scenario.

Decisions to Consider	This Example
Who will approve employee hire requests?	 Managers in the Sales department. The human resources representative of any new hire doesn't need to approve but is informed of the hire after the relevant manager has approved.
Which approval actions must approvers take?	 Managers must approve the hire. The human resources representative receives an approval notification for all hires, but no response is needed.
Can the required level of management approval vary?	The required level of approval varies with the grade of the new hire.
	The requester's:
	 First-level manager approves the trainee grades 1 through 3 Second-level manager approves the professional grades 4 and above

Summary of the Tasks

To define the approval policy in this example, you:

- 1. Navigate to the Manage Approval Rules: Hire an Employee page.
- 2. Assemble the approval sequence.
- 3. Define the approval rule for trainee grades.
- 4. Define the approval rule for professional grades.
- 5. Define the approval rule for all grades.

Navigating to the Manage Approval Rules: Hire an Employee Page

- 1. In the Setup and Maintenance work area, click the Search button and search for the task Manage Approval Transactions for Human Capital Management.
- 2. In the Search Results region, click the task name.
- 3. On the Manage Approval Transactions page, enter the search term Hire in the **Name** field.
- 4. Click Search.
- 5. In the Search Results region, click the Configure button in the Rules column for the transaction Hire an Employee.

Assembling the Approval Sequence

1. On the Manage Approval Rules: Hire an Employee page, confirm that an entry for Line Manager appears in the Approval Sequence region.



2. In the Approvers region, click the **Add** icon on the Human Resources Representative entry to add it to the right of the Line Manager entry in the Approval Sequence region.

Defining the Approval Rule for Trainee Grades

- 1. In the Approval Sequence region, select the Line Manager entry.
- 2. Click the **Edit** icon to edit the rule settings.
- 3. In the **Name** field of the **Edit Rule Settings** window, enter the rule name SalesHiresTraineeGrades. (The name can't contain spaces.)
- 4. In the IF statement for the SalesHiresTraineeGrades rule, click the **Add** icon to the right of the first condition to create an additional condition.
- 5. Complete the fields of the two condition statements as shown in this table.

Attribute Name	Operator	Attribute Value	And or Or
Department	==	Sales	and
Grade	<=	3	

6. In the THEN statement for the SalesHiresTraineeGrades rule, complete the fields as shown in this table.

Field	Value
Action	Approval required
Route Using	Line Manager
Approval Chain of	Requester
Start with	Manager
Number of Levels	1
Top Approver	Manager

Defining the Approval Rule for Professional Grades

- 1. Click Add Rule.
- 2. Click the **Edit** icon to edit the rule settings.
- 3. In the Name field of the Edit Rule Settings window, enter the rule name SalesHiresProfessionalGrades.
- **4.** In the IF statement for the SalesHiresProfessionalGrades rule, click the **Add** icon to the right of the first condition twice to create two additional conditions.
- 5. Complete the fields of the three condition statements as shown in this table.



Attribute Name	Operator	Attribute Value	And or Or
Department	==	Sales	and
Grade	>	3	and
Grade	<=	6	

6. In the THEN statement for the SalesHiresProfessionalGrades rule, complete the fields as shown in this table.

Field	Value
Action	Approval required
Route Using	Line manager
Approval Chain of	Requester
Start with	Second Level Manager
Number of Levels	1
Top Approver	Second Level Manager

Defining the Approval Rule for All Grades

- 1. In the Approval Sequence region, select the Human Resources Representative entry.
- 2. In the Rules region for the new rule, click the **Edit** icon to edit the rule settings.
- 3. In the Name field of the Edit Rule Settings window, enter the rule name SalesHiresAll Grades.
- 4. In the IF statement for the SalesHiresAllGrades rule, complete the fields of the condition statement as shown in this table.

Attribute Name	Operator	Attribute Value
Department	==	Sales

5. In the THEN statement of the SalesHiresAllGrades rule, complete the fields as shown in this table.

Field	Value
Action	Information Only
Representative Type	Human Resource Representative



Field	Value
Representative of	Worker's Proposed Representative

6. Click Submit.

Customizing Approval Notifications Using Page Composer: Explained

Using the Oracle Page Composer, you can selectively show and hide various components of a notification, including fields, labels, and regions. You can edit labels, color, and page layout.

Users with this role: Human Capital Management Application Administrator role or any other role that has this privilege PER_CUSTOMIZE_APPROVAL_NOTIFICATION_PRIV can customize notifications.

Note: Any customizations made to a notification will affect all notifications of the same transaction type.

Customizing Notifications

To customize a notification using the Page Composer, click the Edit button on the top right corner of the notification. You can edit the notification using either the design view or the source view. The design view:

- Is the basic or default view.
- Supports region customization, such as changing the page layout, showing or hiding regions, and adding custom content in regions.
- Can be easily used by functional users who are not familiar with the Oracle Application Development Framework (ADF).

The source view:

- Supports component customization, such as customizing the task flow, editing individual component properties, and showing or hiding individual components.
- Is targeted to technical users and requires understanding of the ADF components.

You can preview the customizations before submitting by clicking the Apply button. The Reset Page option removes all past edits (regardless of when they were made) and restores the page to its default state. Customizations made in a Worklist notification are also visible in the E-mail notification.

Customizations in Design View

The Design view supports the following customizations:

- Customizing the display, including changing the header font, hiding the region header, hiding the complete region, and enabling or disabling ability to resize or remove regions.
- Changing the page style including specifying a different style sheet for the page.
- Customizing the content style such as font, background, and margins; specifying a different style sheet for the content.



- Adding the following custom content in the notification:
 - A box with content
 - HTML markup tags
 - Link to a page or website
 - A box with content, including options to move and resize the box
 - Formatted text
 - A web page within the notification

Customizations in Source View

The Source view supports the following customizations:

- Defining a customer header for the notification
- Defining custom text for the notification body

Related Topics

Customizing Pages: Overview

Customizing an Approval Notification Using Page Composer: Worked Example

This example demonstrates how to customize an approval notification. You received a notification in your worklist to approve a transaction involving creation of a grade. You can add a comment for the subsequent approvers and attach a document to the notification, listing the existing grades and their descriptions. You also want to customize certain notification components.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In this Example
Display the Edit Grade Details link?	No, hide the region containing the link.
Display a screenshot of the Grade Creation page?	Yes, add a link to the screenshot in the Details region
Change the notification header?	Yes, change from "Create Grade Scrade Name , Grade Code , Effective Date " to "Created New Grade"
Change the Effective Start Date label?	Yes, change to Grade Effective Date
Highlight the Grade Effective Date?	Yes, display the date in bold



Customizing Using the Design View

- 1. Click the **Edit** button on the top right corner of the notification page.
- 2. The Design view appears by default. Click the Edit icon in the Related Links region.
- In the Display Options tab, deselect Show Component and click Apply. You can see that the Related Links region disappears. Click OK to confirm.
- 4. Click the Add Content button below the page header.
- 5. Click the Open link in the ADF Faces Components row.
- 6. Click the Add link in the **Image** row. An Image region is added in the notification.
- 7. Click the Edit icon in the Image region and provide the URL of the screenshot in the **Destination** field. The image now includes a link to the screenshot. Move the image region to the end of the **Details** region.

Customizing Using the Source View

- 1. Click the View dropdown button on the top of the page and select **Source** to change from Design to Source view.
- Click the page header to select the panelHeader component. Click Edit to open the Component Properties window.
- 3. In the Text field, click Select Text Resource. Create a text resource and enter the Display Value Created New Grade. Select this text resource and click OK. The page header is now changed.
- 4. Select the **Effective Start Date** field in the **Transaction Details** region. A warning message appears indicating that the changes will be applied to all instances wherever the task flow is used. Click Edit and follow the same steps as in the previous step to change the label to **Grade Effective Date**.
- 5. Click the **Content Style** tab in the **Component Properties** window.
- 6. Select the **Font Style** as bold. The date now displays in bold.
- 7. Click Save to apply all the changes.

Related Topics

Customizing Pages: Overview

FAQs for Approvals

How do I define the approval policy for a task?

Use the Manage Approval Transactions for Human Capital Management task to define the approval policy. On the Manage Approval Rules page for a supported task, such as Hire an Employee, begin by deciding who'll approve transactions. Using either drag and drop or the **Add** action, move those approvers from the Approvers section to the approval sequence and arrange them in the required order. By default, an approver is added to the sequence immediately following the currently selected approver, but you can use drag and drop to change the approver order. When you have defined the approval sequence, select the first approver in the approval sequence to display any predefined approval rule for that approver type. You can edit the displayed approval rule and create additional approval rules, as appropriate. Edit the rule settings to specify a name for each rule. Define approval rules for the remaining approvers in the approval sequence. When you have defined the approval rules for all approvers, submit the approval policy.



What happens if I edit or delete an approval rule?

If you edit or delete an approval rule on the Manage Approval Rules page, then approvals currently in progress complete as if the rule had not been edited or deleted.

New approvals follow the latest version of the rule.

Note: For more information about approvals, see Frequently Asked Questions About Approvals (Doc ID 1987850.1) on My Oracle Support at https://support.oracle.com.





11 HCM Cloud Mobile Setup

HCM Cloud Mobile Setup: Overview

Oracle HCM Cloud offers various features on the mobile device through the Oracle HCM Cloud mobile application. This topic describes the setup and maintenance tasks you must perform to enable users to access the features on their mobile device. You perform these tasks on the HCM application server on your desktop.

Profile Options

You can control the display of the following features on the mobile devices by enabling and disabling the respective profile options:

- Public Profile
- My Team
- Talent Profile
- Learning
- Goals
- Pay
- Absences
- Time
- Employee Self-Service

Profile options are also available to configure login details, cache settings, and other settings on the mobile device.

Modifying Appearance

You can change the appearance of the mobile application such as the theme and color, using options in the **Navigator > Tools > Appearance** menu. You can also create menus items that appear in the mobile application. The applications may be within the Oracle HCM Cloud or any external web applications. For example, you can create menus to link to the Oracle Social Network mobile application or to an external website like LinkedIn.

Profile Options for HCM Mobile Features: Explained

Use predefined profile options in the Setup and Maintenance menu to manage the Oracle HCM Cloud mobile application. Set the profile option to Y to enable a feature on the mobile device. You perform this setup on the application server on your desktop.

To view profile options, perform the following:

- Navigate to the Setup and Maintenance work area in the HCM application server.
- 2. Search for and select the task Manage Administrator Profile Values.



- 3. In the Profile Option Code field, search for TAP%.
- **4.** Click Search to display all the profile options for the Oracle HCM Cloud mobile application:

Feature	Profile Option Code	Description
Identity Federation	TAP_ ENABLE_ IDENTITY_ FEDERATION	 Enable federated identity authentication. This must be set to Y if using Single Sign-On (SSO).
Take Action	TAP_ ENABLE_ TAKE_ ACTION_PAGE	 Enable the Take Action page. Available for iOS only.
Directory Search	TAP_ ENABLE_ DIRECTORY_ SEARCH	o Enable Directory.
Synchronize All Workers	TAP_ ENABLE_ SYNC_ ALL_WORKERS	 Synchronize all worker records from HCM cloud to the mobile application to make workers available in the Directory and Global (ios only) search when offline.
Login Details	TAP_ REMEMBER_ LOGIN_DETAILS	 Enable the mobile application to remember user name between sign in sessions.
Server Idle Timeout	TAP_ SERVER_ IDLE_TIMEOUT	Specify the number of seconds within which users can log back into the mobile application by authenticating against the security on the device. No server connection is needed.
Server Session Timeout	TAP_SERVER_SESSION_TIMEOUT	 Specify the number of seconds after which users must re-authenticate against the server whether online or offline to get a new valid session.
Cache	TAP_ CAN_ PERSIST_CACHE	 Grant the mobile application permission to store data locally between login sessions. This improves performance during subsequent sign in.
Learning	TAP_ ENABLE_LEARN	_o Enable Learn.
Offline Access	TAP_ MOBILE_ OFFLINE	 Configure authentication required for offline access. Default is ORA_FINGER_NOT_REQUIRED. TAP_CAN_PERSIST_CACHE must also be set to Y.
Absences	TAP_ ENABLE_ ABSENCES	_o Enable Absences.
Goals	TAP_ ENABLE_GOALS	_o Enable Goals.
Aligned Goals	TAP_ ENABLE_ ALIGNED_GOALS	o Enable aligned Goals functionality.
Create Goals	TAP_ENABLE_CREATE_GOALS	 Enable or disable Create Goal functionality. TAP_ENABLE_GOALS must also be set to Y.
Pay	TAP_ENABLE_PAY	_o Enable Payroll.



Feature	Profile Option Code	Description
My Day	TAP_ENABLE_MY_DAY	Enable My Day.
Iviy Day	IAI _ LIVADEE_IVII _DA I	O LHADIE WIY Day.
My Team	TAP_ ENABLE_ MY_TEAM	o Enable My Team
Hiring	FTA_ ENABLE_ HIRING_ MENU_ITEM	_o Enable Hiring.
Edit Contact Information	TAP_ ENABLE_ CONTACT_INFO	 Enable the action allowing workers to view and update their phone number and email address.
Edit Contacts	TAP_ ENABLE_ CONTACTS	 Enable the action allowing employees to view and update their emergency contacts.
Edit Documents	TAP_ ENABLE_ MY_DOCS	 Enable the action allowing employees to view and edit government related document details such as passport number.
Profile	TAP_ENABLE_UPLOAD_ PROFILE_PHOTO	 Enable the action allowing employees to upload their own profile photos.
Export Public Profile	TAP_ ENABLE_ EXPORT_ CONTACTS	 Enable the action allowing employees to export public profile contact information to the address book on their mobile devices.
Public Profile	TAP_SHOW_PUBLIC_PROFILE	_o Enable Public Profile.
Primary Phone Number	TAP_SHOW_PHONE_PUBLIC_PROF	 Enable the display of primary phone number in the Public Profile.
Primary Email	TAP_ SHOW_ EMAIL_ PUBLIC_PROF	 Enable the display of Primary Email Address in the Public Profile.
Length of Service	TAP_ SHOW_ LEN_ OF_ SERV_ PUBLIC_PROF	 Enable the display of Length of Service in the Public Profile.
Grade	TAP_ SHOW_ GRADE_ PUBLIC_PROF	 Enable the display of Grade in the Public Profile.
Position	TAP_ SHOW_ POSITION_ PUBLIC_PROF	 Enable the display of Position in the Public Profile.
Job	TAP_SHOW_JOB_PUBLIC_PROF	 Enable the display of Job in the Public Profile.
Time	TAP_ ENABLE_TIME	o Enable Time.



Feature	Profile Option Code	Description
Publish Video	TAP_ ENABLE_ PUBLISH_VIDEO	 Enable the ability to publish videos. TAP_ENABLE_LEARN must also be set to Y.
Upload Profile Photo	TAP_ENABLE_UPLOAD_ PROFILE_PHOTO	 Enable the Upload Profile Photo action allowing employees to upload their own photo to their public profile.
Worker Biographical Information	TAP_ ENABLE_ WORKERBIO	 Enable employees to update Biographical information such as their name and marital status.
Worker Prediction	TAP_ ENABLE_WORKER_ PREDICTION	o Enable Worker Predictions.
Talent	TAP_ ENABLE_ TALENT_ PROFILE	o Enable Talent profile.
Worklist	TAP_ ENABLE_ WORKLIST	o Enable Worklist.

Related Topics

• Profile Options: Overview

Profile Options: Explained

• Creating and Editing Profile Options: Procedure

Modifying HCM Mobile Features: Explained

Use the options in the Tools work area to modify the look and feel of your mobile application.

Note: Some modifications to Oracle HCM Cloud mobile require configuration in the HCM application server.

Changing Mobile Appearance

The mobile application uses the same theme used in the web application. To change the appearance of the mobile application, you must change the appearance of your web application as well. You can:

- Change the default theme by selecting a different theme.
- Change the color scheme: Select a different background, heading, button, and page link color.
- Change the logo or watermark: You can select and add a logo or background image.



Modifying the Navigator

Use the Structure work area to add menus to link to internal and external mobile applications from the Oracle HCM Cloud mobile application. Create menus for users to access those functions that are not available by default within the mobile application. You can add menus to access:

- Pages and self-service actions available through a deep link
- Oracle Social Network (OSN) application
- Oracle Business Intelligence (BI) application to view analytics
- Functions performed in external applications

You can control access to the menus by using EL expressions.

Related Topics

Configuring Oracle Social Network on Your Mobile Device: Procedure

Configuring HCM Menus on Mobile Devices: Worked Example

This example shows how to create and configure menus to link to the Oracle Business Intelligence and Oracle Social Network mobile applications from the Oracle HCM Cloud mobile application. To create the menus, navigate to the Structure work area under Tools, create a category and page entries within the category. You can use EL expressions to control the roles that can access the menu. The roles with access must include the appropriate privileges that give users access to participate in Oracle Social Network conversations and to view Business Intelligence analytics.

The following table summarizes the key decisions for this scenario:

Decisions to Consider	In this Example
Install the applications that the menus link to?	Yes, install the following mobile applications:
	Oracle Social NetworkOracle Business Intelligence
What menus to create?	 Social Collaboration menu that links to the installed Oracle Social Network mobile application Reports and Analytics menu that links to the installed Oracle Business Intelligence mobile application
Where to create the menus?	Create a category Self-Service and create the menus under this category.
Roles that can access the menus?	EmployeeManager



Prerequisites

- 1. In the Navigator menu, select Tools then Structure.
- 2. Activate a sandbox. If you're not in an active sandbox, click Edit on the Structure page. You're prompted to activate a sandbox.

If you're already in an active sandbox, then the Edit button doesn't appear on the Structure page.

Creating a Category

- 1. Click Create, and select Create Category
- 2. Enter the category name Self-Service.
- 3. Search and select an icon for the category.
- 4. Select EL Expression in the Visible field.
- 5. Click Edit icon next to the Visible drop-down list and enter the following expression:

```
#{(securityContext.userInRole ['MOBILE_ONLY']) and (securityContext.userInRole ['<ROLE_NAME>']) and
#{(securityContext.userInRole ['<ROLE_NAME>'])}
```

- Note: You must replace the tokens with the name of your employee and line manager roles.
- 6. Click Save and Close.

Creating a Page Entry

- 1. Click Create Page Entry.
- 2. Search and select an icon for the page entry.
- 3. In the Category field, select the Self-Service category that you created above.
- 4. Complete the fields, as shown in this table.

Field	Value
Name	Social Collaboration
Show on Welcome Springboard	Yes
Link Type	Static URL
Destination	osn://?action=open

- 5. Click Save and Done.
- 6. Repeat steps 1 to 3 to create the second menu.
- 7. Complete the fields, as shown in this table:



Field	Value
Name	Reports and Analytics
Show on Welcome Springboard	Yes
Link Type	Static URL
Destination	oraclebimobile://

8. Click Save and Done.

Publishing the Changes

After completing the configuration in the sandbox, you must publish them to make them available in the mobile device.

- 1. Click your user name in the global area, and select Manage Sandboxes from the Administration menu.
- 2. On the Manage Sandboxes dialog box, select the sandbox and click Publish. The Publish confirmation message box appears.
- 3. Click Yes. The sandbox is published to the mainline metadata.
- 4. Close the Manage Sandboxes dialog box. Log out of the application and log in to your mobile device. In the main menu, you will now see the two menus under Self-Service. Click the menus to launch the respective applications.

FAQs for HCM Cloud Mobile Setup

How can I enable federated single sign-on for Oracle HCM Cloud mobile?

If single sign-on hasn't already been enabled, then you file a service request. When you file the request, indicate that you want to enable federated single sign-on for Oracle HCM Cloud mobile. For more information, see Single Sign-On (SSO) Enablement (2100578.1) on My Oracle Support at https://support.oracle.com.

Related Topics

- Oracle Applications Cloud Service Entitlements (2004494.1)
- Oracle Applications Cloud Service Single Sign-On Enablement (2100578.1)



What are some best practices to help users configure Oracle HCM Cloud Mobile?

To help users install and configure Oracle HCM Cloud mobile:

- Instruct users to follow instructions included in the Oracle HCM Cloud Configurator page.
- Check that the TAP_ENABLE_IDENTITY_FEDERATION profile option is configured if federated single-sign on is being used.
- Request users to contact their administrator if they experience issues with auto configuration.



12 Application Toolkit Configuration

Define Application Toolkit Configuration: Overview

Oracle Fusion Application Toolkit (ATK) provides many features that are available to users of all product families. These features include Applications Help, the Reports and Analytics pane, and the Watchlist. In the Setup and Maintenance work area, use the Define Application Toolkit Configuration task list to set up some of these components. Use the Define Help Configuration task list to set up Applications Help.

Note: The Define Application Toolkit Configuration task list is available in implementation projects only if the Application Toolkit Component Maintenance feature choice is selected.

Tasks

The Define Application Toolkit Configuration task list contains these tasks:

- Map Reports to Work Areas: Determine what's available in the Reports and Analytics pane for specific work areas.
- Set Watchlist Options: Define settings that affect what's displayed in the Watchlist and how often items are refreshed.
- Manage Application Toolkit Administrator Profile Values: Set profile options to affect how some Application Toolkit features work.

Related Topics

• Setting Up Help: Overview

Map Reports to Work Areas

Setting Up the Reports and Analytics Pane: Procedure

You can find the Reports and Analytics pane in many work areas, and the analytics and reports you see in the pane depends on the work area. You can define what's available for a specific work area, by mapping reports from the business intelligence (BI) catalog to that work area. In this mapping context, reports refer to both analytics and reports. Your changes apply to all users who have access to the work area you're mapping.

Mapping Reports from Your Work Area

To map reports to the work area that you're in:

Click the Edit Settings icon in the Reports and Analytics pane.
 You see all the reports that are currently mapped to your work area.



- 2. Click Select and Add.
- 3. Find the report in the catalog and select it.
- 4. Click OK.
- 5. To remove any mapping, select the report and click **Remove**.
- 6. Save your work.

Mapping Reports to Any Work Area

To map reports to any work area that you have access to:

- 1. Go to the Setup and Maintenance work area and open the Map Reports to Work Areas task.
- 2. Select the application of the work area you want to map to.
- 3. Select the work area.
- 4. Click **Search** and see all the reports that are currently mapped to that work area.
- 5. Click Select and Add.
- 6. Find the report in the catalog and select it.
- 7. Click OK.
- 8. To remove any mapping, select the report and click **Remove**.
 - Tip: Click **Synchronize** to remove all mappings to any reports that are no longer in the catalog. You synchronize all work areas, not just the one you're mapping.
- 9. Save your work.

Related Topics

Reports and Analytics Pane: Explained

Setting Reports Up for Scheduling in the Reports and Analytics Pane: Procedure

You can set up reports as scheduled processes, which means users can submit them from the Scheduled Processes and other work areas. If you want users to also submit these scheduled processes from the Reports and Analytics pane, then you must configure properties for the corresponding reports.

Enabling a Report for Scheduling

To enable scheduling in the Reports and Analytics pane:

- Select the report in the business intelligence catalog and click Edit.
- 2. Click Properties.
- 3. On the General tab in the Properties dialog box, enter the following fields:

Field	Value
Enterprise Scheduler Job Package Name	The path for the job definition, for example: / oracle/ apps/ ess/ <pre>cproduct family>/ <pre>cproduct>/</pre></pre>
Enterprise Scheduler Job Definition Name	The job definition name (not display name), for example: ABCDEFG



Field Value

Related Topics

- · Setting Reports Up to Run as Scheduled Processes: Points to Consider
- Accessing Report Components to Customize: Points to Consider

FAQs for Map Reports to Work Areas

Why can't I see reports when mapping reports to work areas for the Reports and Analytics pane?

Either no reports are currently mapped to the work area you select on the Map Reports to Work Areas page, or you don't have access to the reports that are mapped.

Similarly, when you're selecting a report to map, you can see only the reports that you have access to. Ask your administrator to either:

- Assign you roles that have access to the reports you want to map to work areas.
- Grant the Reports and Analytics Region Administration Duty to someone who already has access to those reports.

Why can't I see reports when I edit settings for the Reports and Analytics pane?

In the Edit Settings window, you might not see a currently mapped report because you don't have access to it.

Similarly, when you're selecting a report to map, you can see only the reports that you have access to. Ask your administrator to either:

- Assign you roles that have access to the reports you want to map to work areas.
- Grant the Reports and Analytics Region Administration Duty to someone who already has access to those reports.

Set Watchlist Options

Disabling and Enabling Watchlist Categories and Items: Points to Consider

You can disable or enable predefined Watchlist categories and items for all users. Use the Set Watchlist Options task in the Setup and Maintenance work area.

Ultimately, what users see in their own Watchlist would be the categories and predefined items that you enable in the Set Watchlist Options page:

- Plus any saved searches that the user is using as Watchlist items
- Minus any categories or items that the user decides to hide using Watchlist preferences



Minus any items with no results found, if the user decides to hide such items using Watchlist preferences

Any Category or Item

When you disable any category or item, you also disable the processes that calculate the Watchlist item counts. These processes include creating data caches, performing security checks, calling services across domains, running queries, and so on.

Predefined Watchlist Items

An item with the Predefined type represents the actual predefined Watchlist item that appears in the Watchlist. If you disable this type of Watchlist item, then:

- The item isn't available for users to display in their Watchlist.
- The item is removed from any Watchlist where it's currently displayed.

If you disable a Watchlist category, then the category is not available for users to include in their Watchlist. All Watchlist items within the category are also disabled.

User-Created Saved Search Watchlist Items

A Watchlist item with the User-Created Saved Search type doesn't appear in the Watchlist. It controls the display of the **Manage Watchlist** button on pages with saved searches. If you disable this type of Watchlist item, then:

- The **Manage Watchlist** option isn't available on the corresponding page, so users can't use their own saved searches as Watchlist items.
- Any user-defined saved searches (from that page) already used as Watchlist items are removed from the users' Watchlist. The saved searches are still available for searching, but not for the Watchlist.

Watchlist Category

If you disable a Watchlist category, then:

- The category isn't available for users to include in their Watchlist.
- All Watchlist items within the category are also disabled.

Related Topics

- · Creating Watchlist Items: Procedure
- Displaying and Hiding Watchlist Items: Procedure

Refresh Intervals for Watchlist Items: Explained

All Watchlist items have a predefined refresh interval, which controls how often the query that calculates the count for a Watchlist item can run. Use the Set Watchlist Options task in the Setup and Maintenance work area to edit the interval values.

How the Refresh Works

The count for any Watchlist item gets refreshed as follows.

- When users open the Watchlist in the global area for the first time after signing in, the item is refreshed if five minutes have passed since its last refresh in an earlier session.
- When users open the Watchlist again, the item is refreshed only if the time since its last refresh is equal to or greater than the refresh interval.



User-Created Saved Search Watchlist Items

What you enter as the refresh interval for a Watchlist item of type User-Created Saved Search applies to all Watchlist items based on saved searches that users create for that item. For example, you set the refresh interval for the Corporate Card Transactions item to five minutes. Multiple users create saved searches for corporate card transactions and use those saved searches as Watchlist items in their own Watchlist. All of these Watchlist items would have a refresh interval of five minutes.

Related Topics

Creating Watchlist Items: Procedure

FAQs for Set Watchlist Options

How can I change predefined Watchlist category and item names?

Edit the standard lookup type that stores the predefined Watchlist category and item names.

- 1. In the Setup and Maintenance work area, go to the Manage Standard Lookups task.
- Find the lookup type for the Watchlist category you want to edit. Lookup types for predefined categories end with WATCHLIST, for example EXM_EXPENSES_WATCHLIST.
- 3. Edit the lookup type meaning to change the category name.
- 4. To change item names, edit lookup code meanings.
- 5. Save your work.

Related Topics

· Lookups: Explained

Manage Application Toolkit Administrator Profile Values

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

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



13 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:
 - o 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.
- 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:

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



2. Optionally set options in these sections:

o 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?





14 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 Reference Data Sharing

Reference Data Sharing: Explained

Reference data sharing facilitates sharing of configuration data such as jobs and payment terms, across organizational divisions or business units. You define reference data sets and determine how common data is shared or partitioned across business entities to avoid duplication and reduce maintenance effort. Depending on the requirement (specific or common), each business unit can maintain its data at a central location, using a set of values either specific to it or shared by other business units.

A common reference data set is available as the default set, which can be assigned to several business units sharing the same reference data. For commonly used data such as currencies, you can use the common reference data set and assign it to multiple business units in various countries that use the same currency. In cases where the default set can't be assigned to an entity, you can create specific sets. The data set visible on the transactional page depends on the sharing method used to share reference data.

For example, XYZ Corporation uses the same grades throughout the entire organization. Instead of different business units setting up and using the same grades, XYZ Corporation decides to create a set called Grades, which contains the grades. All business units in the organization have the Grades set so that the grades can be shared and used.



Note: For specific information about configuring reference data sharing for a particular object or product, refer to the relevant product documentation.

Related Topics

- Reference Data Sets and Sharing Methods: Explained
- Assigning Reference Data Sets to Reference Objects: Points to Consider

Reference Data Sets: Explained

Reference data sets are logical groups of reference data that various transactional entities can use depending on the business context. You can get started using either the common reference data set or the enterprise set depending on your implementation requirement. You can also create and maintain custom reference data sets, while continuing to use the common reference data set.

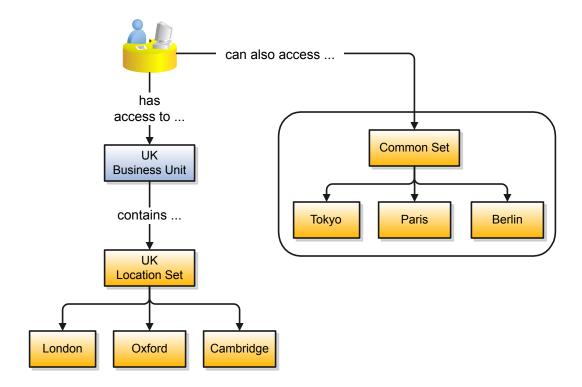
Consider the following scenario. Your enterprise can decide that only some aspects of corporate policy should affect all business units. The remaining aspects are at the discretion of the business unit manager to implement. This enables your enterprise to balance autonomy and control for each business unit. For example, your enterprise holds business unit managers accountable for their profit and loss, but manages working capital requirements at a corporate level. Then, you can let managers define their own sales methods, but define payment terms centrally. As a result, each business unit has its own reference data set for sales methods and one central reference data set for payment terms assigned to all business units.

Partitioning

Partitioning reference data and creating data sets provide you the flexibility to handle the reference data to fulfill your business requirements. You can share modular information and data processing options among business units with ease. You can create separate sets and subsets for each business unit. Alternatively, you can create common sets or subsets to enable sharing reference data between several business units, without duplicating the reference data.



The following figure illustrates the reference data sharing method (assignment to one set only, with common values). The user can access the data assigned to a specific set in a particular business unit, as well as access the data assigned to the common set.



Related Topics

- Reference Data Sets and Sharing Methods: Explained
- Defining Default Reference Data Sets: Points to Consider
- Assigning Reference Data Sets to Reference Objects: Points to Consider

Reference Data Sets and Sharing Methods: Explained

Oracle Fusion Applications reference data sharing feature is also known as SetID. The reference data sharing functionality supports operations in multiple ledgers, business units, and warehouses. As a result, there is a reduction in the administrative burden and the time to implement new business units. For example, you can share sales methods, or transaction types across business units. You may also share certain other data across asset books, cost organizations, or project units.

The reference data sharing features use reference data sets to which reference data is assigned. The reference data sets group assigned reference data. The sets can be understood as buckets of reference data assigned to multiple business units or other application components.

Reference Data Sets

You begin this part of your implementation by creating and assigning reference data to sets. Make changes carefully as changes to a particular set affect all business units or application components using that set. You can assign a separate



set to each business unit for the type of object that is being shared. For example, assign separate sets for payment terms, transaction types, and sales methods to your business units.

Your enterprise can determine that certain aspects of your corporate policy can affect all business units. The remaining aspects are at the discretion of the business unit manager to implement. This allows your enterprise to balance autonomy and control for each business unit. For example, your enterprise holds business unit managers accountable for their profit and loss, but manages working capital requirements at a corporate level. In such a case, you can let managers define their own sales methods, but define payment terms centrally. In this example:

- Each business unit has its own reference data set for sales methods.
- One central reference data set for payment terms is assigned to all business units.

The reference data sharing is especially valuable for lowering the cost of setting up new business units. For example, your enterprise operates in the hospitality industry. You are adding a new business unit to track your new spa services. The hospitality divisional reference data set can be assigned to the new business unit to quickly set up data for this entity component. You can establish other business unit reference data in a business unit-specific reference data set as needed.

Reference Data Sharing Methods

Variations exist in the methods used to share data in reference data sets across different types of objects. The following list identifies the methods:

- Assignment to one set only, no common values allowed. This method is the simplest form of sharing reference
 data that allows assigning a reference data object instance to one and only one set. For example, Asset Prorate
 Conventions are defined and assigned to only one reference data set. This set can be shared across multiple asset
 books, but all the values are contained only in this one set.
- Assignment to one set only, with common values. This method is the most commonly used method of sharing
 reference data that allows defining reference data object instance across all sets. For example, Receivables
 Transaction Types are assigned to a common set that is available to all the business units. You need not explicitly
 assign the transaction types to each business unit. In addition, you can assign a business unit-specific set of
 transaction types. At transaction entry, the list of values for transaction types includes the following:
 - Transaction types from the set assigned to the business unit.
 - Transaction types assigned to the common set that is shared across all business units.
- Assignment to multiple sets, no common values allowed. The method of sharing reference data that allows a
 reference data object instance to be assigned to multiple sets. For instance, Payables Payment Terms use this
 method. It means that each payment term can be assigned to one or more than one set. For example, you assign
 the payment term Net 30 to several sets, but assign Net 15 to a set specific only to your business unit. At transaction
 entry, the list of values for payment terms consists of only the set that is assigned to the transaction's business unit.
- Note: Oracle Fusion Applications contains a reference data set called Enterprise. Define any reference data that affects your entire enterprise in this set.

Related Topics

- Items and Supplier Site Reference Data Sharing: Explained
- What reference data objects can be shared across cost organizations?
- What reference data objects can be shared across project units?
- What reference data objects can be shared across business units?
- What reference data objects can be shared across asset books?



Assigning Reference Data Sets to Reference Objects: Points to Consider

You can assign the reference data sets to reference objects using the Manage Reference Data Set Assignments page. For multiple assignments, you can classify different types of reference data sets into groups and assign them to the reference entity objects. The assignment takes into consideration the determinant type, determinant, and reference group, if any.

Determinant Types

The partitioned reference data is shared using a business context setting called the determinant type. A determinant type is the point of reference used in the data assignment process. The following table lists the determinant types used in the reference data assignment.

Туре	Description
Asset Book	Information about the acquisition, depreciation, and retirement of an asset that belongs to a ledger or a business unit.
Business Unit	The departments or organizations within an enterprise.
Cost Organization	The organization used for cost accounting and reporting on various inventory and cost centers within an enterprise.
Project Unit	A logical organization within an enterprise that is responsible for enforcing consistent project management practices.
Reference Data Set	References to other shared reference data sets.

Determinant

The determinant (also called determinant value) is a value that corresponds to the selected determinant type. The determinant is one of the criteria for selecting the appropriate reference data set.

Reference Groups

A transactional entity may have multiple reference entities (generally considered to be setup data). However, all reference entities are treated alike because of similarity in implementing business policies and legal rules. Such reference entities in your application are grouped into logical units called reference groups. For example, all tables and views that define Sales Order Type details might be a part of the same reference group. Reference groups are predefined in the reference groups table.

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.

Related Topics

- What's the difference between precision, extended precision, and minimum accountable unit for a currency?
- What's a statistical unit currency type?
- Euro Currency Derivation: Explained

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).

Related Topics

Defining Currencies: Points to Consider

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

Audit Impersonation: Explained

Users can temporarily designate other users to impersonate their profiles and perform application tasks on their behalf. By default, all impersonations are audited. In the global area, click your user name and from the Settings and Actions menu, select **Set Preferences**.

At run time, audit setup tracks and stores information about all attributes, whether auditing is enabled for an attribute or not. As a result, impersonation auditing is also active even when auditing is disabled for an application. The audit history captures the impersonator information in addition to the actual user information. Therefore, while viewing audit history, users can retrieve the audited information, filtered by an impersonated user.

To assign or modify impersonations, in the Tasks pane on the Preferences page, click **Proxies**. You can search for the users who can be impersonated and switch the access to that user.

Note: The associated profile option Audit Impersonation Transaction Enabled is enabled by default. To disable it, set its profile value to **No**.

Related Topics

Proxies: Explained

Auditing Talent Management Business Objects: Explained

Set up auditing policies to maintain a history of changes to your important data: what changed, who changed it, and when. The audit tracks changes to attributes of Oracle Fusion Talent Management business objects made using the application pages, web services, or talent management processes, which use Oracle Enterprise Scheduler.

You can view the audit history to determine how a business object obtained its current value and to compare old and new values. To set up auditing, you must have the Application Implementation Consultant job role to access the Manage Audit Policies task. To view audit data, you must have the Internal Auditor job role.

Talent Management Business Objects

When you set up auditing for business objects in talent management, you configure Oracle Fusion Applications business objects on the Manage Audit Policies page in the Setup and Maintenance work area:

- 1. Select the HCM Talent application on the Configure Business Object Attributes page.
- 2. Specify the attributes to audit for the objects. For example, you may audit the rating level and numeric rating attributes for rating levels.



The following table lists the talent management business objects to audit.

Talent Management Business Object	Audited Attributes	
Talent content library including rating models, rating levels, and content items	 From and to dates, code, name, distribution threshold, and description for rating models From and to points, maximum and minimum distributions, numeric and star ratings, name, rating level, short description, review points, and description details for rating levels Item code, from and to dates, item description, name, rating model details for content items 	
Talent pools	Status details of talent pool members	
Talent profiles including person and model profiles	Keywords and from and to dates for person and model profiles	
Talent profiles setup including content section properties	Label, column name, default value, display, source, required, searchable, value set name, and view attribute details for profile type section properties (also called content section properties)	
Performance evaluation	Comment and performance rating details for evaluation sections and evaluation items, and proficiency level details for evaluation items	
Succession plans	Status details of succession plan candidates	

Audit Reports

Talent management enables users with the Internal Auditor job role to view audit reports for audit-enabled talent management business objects. You can view the changes that the application data underwent. The report provides you with details of the talent management business objects that were created, updated, and deleted. You can select among several search parameters to decide the type of audit history report that you require. To access the Audit Reports work area, select **Navigator - Tools - Audit Reports**.

Related Topics

Audit History: Explained

Auditing Payroll Business Objects: Explained

Set up auditing policies to maintain a history of changes to your important data: what changed, who changed it, and when. The audit tracks changes to attributes of payroll business objects made using the application pages, web services, or payroll processes, which use Oracle Enterprise Scheduler.

You can view the audit history to determine how a business object obtained its current value and to compare old and new values. To view the history or to create an audit report from the Audit History work area, you require appropriate duty roles and privileges. Enterprises typically assign the following two audit duty roles to the application implementation consultant and master data management application roles:

- Audit trail management, which determines the objects audited
- Audit trail report viewing to view the audit history



Payroll Business Objects

When you set up auditing for payroll, you configure Oracle Fusion Applications business objects on the Manage Audit Policies page in the Setup and Maintenance work area:

- 1. Select the HCM Payroll application on the Configure Business Object Attributes page.
- Specify the attributes to audit for the objects.For example, you might audit the start and end date attributes for the calculation card component details.

The following table lists the payroll objects to audit.

Payroll Business Object	Description
Assigned Payroll	Holds date-effective attributes about payrolls assigned to a worker.
Assigned Payroll More Details	Holds details that aren't date-effective about the payroll assigned to a worker
Calculation Card	Holds values required for calculating payroll components
Calculation Card Component	Holds the definition of a component that represents one or more logically related payroll components
Calculation Card Component Detail	Holds the input values of a person's calculation card
Calculation Reporting Card	Defines the tax reporting units that report the calculation
Calculation Reporting Card Usage	Attaches a reporting card to a person record
Element Entry	Holds earning and deductions details for a person
Element Entry Value	Holds the values of the compensation and benefits granted to a person
Payroll Calculation Range Value	Defines the values or sets of values used in the calculation of a value definition
Payroll Calculation Value Definition	Defines how a value is calculated in payroll processing
Personal Payment Method	Holds the payment method details for a person

Related Topics

• Audit History: Explained

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

Messages Setup



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.

Manage 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.



15 WebLogic Communication

Oracle Sales Cloud CTI: Highlights

Oracle Sales Cloud Computer Telephony Integration (CTI) integrates with your telephony environment and must be manually enabled in your deployment. This topic highlights what is required to set up the CTI feature and to implement logging of the calls made using the CTI feature.

CTI is a feature of the customer contact process. You initiate phone communication to customers and employees with a click of your mouse, leveraging your customer contact information and the application context. The CTI feature uses Oracle WebLogic Communication Services to enable communications. Applications that provide the CTI functionality do so primarily through contextual actions.

Additionally, CTI utilizes Oracle Sales Cloud tasks as an optional transaction logging feature that will track information about the call such as the customer, call participants, a time stamp noting the start time of the call, the direction of the communication, in or outbound, and the resolution code.

Terms used in setting up these communications include:

- PSTN: Public switched telephone network is the network of the world's public circuit-switched telephone networks.
- SIP: Session initiation protocol, an open signaling protocol standard that is used to set up phone calls
- TPCC: Third Party Call Control enables an application to control the telephony network to set up calls automatically.
- Oracle WebLogic Communication Services. Offers the TPCC service to Oracle applications and sets up the calls using SIP integration with the telephony network.

The setup task list Define WebLogic Communication Services Configuration includes four tasks required for the correct configuration and implementation of CTI. One optional task, separate from the setup task list, is required for implementing task logging.

You can find information about implementing CTI in the Oracle Sales Cloud Administrator's Guide. Detailed information about configuring and maintaining WebLogic Communication Services is found in the Oracle WebLogic Communication Services Administrator's Guide

Configure and Deploy WebLogic Server

Deploy WebLogic Communication Services: After the Oracle WebLogic communication server is deployed, this
manual task activates the server.

See: Oracle WebLogic Communication Services Administrator's Guide

Integrate Communications Services

Integrate WebLogic Communication Services with Telephony Network: This manual task integrates communications
within the telephony environment. Oracle WebLogic Communication Services must be configured to interface with
the specific characteristics of the telephony network.

See: Managing Oracle WebLogic Communication Services for CTI Functionality



Specify the Domain and Address

Register a URL for the telephony gateway or soft switch for SIP domain: This task defines the Server protocol, defaulted to http, the external server host address, and external server port address. The Associated Modules section is not required for setup. You can also perform this as a manual task using Topology Manager to configure the address of the SIP Public Switched Telephone Network (PSTN) gateway or SIP soft switch serving the users within that domain. This address is needed by CTI to correctly form the SIP addresses required by WebLogic Communication Services. See the link to Configuring PSTN Gateway Address Using Topology Manager: Worked Example.

Enable Click-to-Dial

• After configuring the server and defining the SIP domain, perform the Enable Click-to-Dial task. This task sets the value of the profile option Enable Click-to-Dial to Yes.

Call Logging Using Tasks

To initiate the task based logging for CTI, set the profile option Call Interaction Logging Enabled to Yes'

Configuring PSTN Gateway Address Using Topology Manager: Worked Example

This example demonstrates how, during the implementation of the **Register URL for the telephony gateway or soft switch for SIP domain** task, you must manually configure the PSTN gateway address by registering HzCTDPstnGatewayApp to a given environment using Oracle Fusion Topology Registration

These steps configure the address of the SIP Public Switched Telephone Network (PSTN) gateway or SIP soft switch serving the users within that domain. This address is needed by Click-to-Dial to correctly form the SIP addresses required by WebLogic Communication Services. For example: sip:+1650-555-1212@pstn_gateway.oracle.com;user=phone where pstn gateway.oracle.com is the SIP domain. The SIP domain can also be expressed in the format 10.1.1.1 (IP address).

Configuring PSTN Using the Topology Manager

To configure PSTN:

- Sign in to Oracle Sales Cloud as a user that has application implementation consultant and WebLogic Services administration roles.
- 2. In Setup and Maintenance, click Register Enterprise Applications from the regional area under **Topology Registration.**
- 3. On the Register Enterprise Applications page, click the plus icon to add an enterprise application. An Add Enterprise Application dialog box appears.
- Enter the new application information: Click Search in the Enterprise Application list field. Enter HzCTDPstnGatewayApp in the name field and click Search.
- 5. Click OK.
- 6. Enter the other fields in the Add Enterprise Application dialog box.



Field	Value
Name	HzCTDPstnGatewayApp
Server Protocol	SIP This field is ignored by Click-to-Dial. Oracle WebLogic Communication Service (OWLCS) always uses the SIP protocol.
External Server Host	10.143.167.91 (Used as an example) A host name can be used instead of an IP address.
External Server Port	0 (Used as an example) This field is ignored by Click-to-Dial.

7. Click Save and Close.





16 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.

Related Topics

Maintain Common Reference Objects: Overview

Define 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	М	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.

Related Topics

- Modules in Application Taxonomy: Explained
- How can I access predefined lookups?

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

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



Lookup Code	Meaning	Enabled	Display Sequence
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

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
US	VP	Needs Vice President's Approval



Reference Data Set	Lookup Code	Lookup Meaning
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 Define Lookups

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 endusers 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 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.
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.

Define Document Sequences

Document Sequences: Explained

You can assign a document sequence number to each business document or business event to uniquely identify it. For example, you can assign a document sequence number to an invoice that gets generated in response to a purchase order. However, you must enable the document sequencing option for that business document or event to start assigning the number. A document sequence number is useful in tracking completed or failed transactions.

You can set up document sequencing in three different modes:

Automatic



- Manual
- Gapless
- Note: Plan your document sequencing carefully before you start applying sequence numbers. Avoid switching to a different mode after you saved your work on the Manage Document Sequences and Manage Document Sequence Categories pages.

Automatic Sequencing

Automatic document sequencing assigns a unique number to each document automatically when the document is generated. That unique number is stored in the database. You can set an initial value for the numbering sequence. Thereafter, the numbering is sequential by date and time of creation. If you don't provide an initial value, the application sets the default initial value as 1.

Manual Sequencing

Use the manual sequencing mode to assign a unique number to each document before the document is generated. In manual sequencing, the numeric ordering and completeness of a transaction is not automatically enforced. As a result, users can skip or omit numbers when entering the sequence value. However, each time a user assigns a number, the application validates its uniqueness.

Gapless Sequencing

Gapless sequencing is similar to automatic sequencing. It automatically generates a unique number for each document, but does that only for successfully generated documents. Sequence numbers are not assigned to incomplete or failed documents. As a result, the sequence is maintained for all the successfully generated documents.

Additionally, you can control the gapless document sequencing by enforcing the Transaction Date Validation option. When enabled, this option checks for the transaction date of a particular document and assigns the sequence number accordingly, to chronologically maintain the documents. The sequence numbers and the transaction dates are chronologically correlated to prevent any mismatch of a new document sequence being assigned to an older document or vice versa.

Note: Use this type of sequencing only if necessary because it may affect the performance of the application and slow down transaction processing.

Related Topics

Modules in Application Taxonomy: Explained

Document Sequence Categories: Explained

A document sequence category is a set of documents that share similar characteristics and that are formed into a logical group. Document sequence categories simplify the task of assigning number sequences to specific documents. Instead of assigning a number to each document, you assign a document sequence to one or more document sequence categories. The document sequence category automatically takes care of numbering the documents.

A document sequence category identifies the database table that stores documents resulting from transactions that your users enter. When you assign a sequence to a category, the sequence numbers the documents that are stored in a particular table. You must create document sequence categories to be able to manage the task of assigning document sequences.



Note: Once a document sequence category is created, you can't change the application, the category code, or the table name. Therefore, carefully consider these details and plan your document sequencing requirement before you begin working with the application.

Once you create a document sequence category, it is available for use under the **Document Sequences: Assignments** section on the Manage Document Sequences page. The **Category** field contains the name of the document sequence category. After you create a document sequence, you can assign it to a document sequence category.

Document Sequences: Points to Consider

Sequencing documents is an important business and legal requirement. Therefore, you must first decide the appropriate document sequence to use for a set of documents. Before you begin, here are a few prerequisites:

- Determine beforehand the mode of document sequencing, because you can't switch to other types once a sequence is in use.
- Note details such as the document sequence and document sequence category, for later reference.
- Identify if there are any restrictions or configuration prerequisites.
- Note: Products that implement document sequencing have specifications about its usage. Refer to the corresponding product documentation for specific details and also to determine if there are any restrictions or configuration prerequisites.

Creating and Editing Document Sequences

You can create document sequences that are automatic, manual, or gapless, depending on the business or legal requirement. By default, the current date is considered as the start date. The sequence definition never expires if you don't provide an end date. Among the several options used in creating and editing document sequences, the following options are functionally more important and therefore must be carefully determined:

- Determinant Type: Select to limit the document sequencing activity to certain documents that belong to a specific business entity, such as Ledger, Tax Registration, and so on.
- **Initial Value**: Enter a value for the first document in your sequence. This field applies only to sequences with automatic or gapless numbering types. Sequence numbers must not be greater than eight digits. If you leave this field blank, the first document is automatically assigned a value of 1. Once a document sequence is defined, you can't change this initial value.

Creating and Editing Document Sequence Categories

Document sequence categories are defined to make it easy to assign document sequence definitions to a group of documents instead of to individual documents. Each document sequence category is mapped to a specific table, where the documents belonging to that category are stored. When specifying the table, you must consider the following points:

- When the sequential numbering feature checks for completeness or generates a report, it locates the category's documents in the table.
- Select only those tables that belong to the application associated with the category.
- Once a category is defined, you can't switch to another table.

Assigning Document Sequences

Identify the documents to be numbered before assigning them a document sequence. For each document sequence, there can be only one active assignment to a document sequence category, and a determinant value (if applicable). As part of



the assignment, specify whether the document is created automatically (for example, due to a batch process, or manually through a form). If you don't specify an end date, the assignment continues to remain active throughout the process cycle. If a determinant type was specified for the document sequence, then enter a specific determinant value related to the determinant type.

At run time, when users create documents, the document sequence to be assigned is determined based on the following:

- An active assignment that matches the correct combination of category
- The numbering method
- The date range containing the transaction date

Auditing Document Sequences

You can audit document sequences, if required, to provide an audit trail of the document sequences used in a specific product. However, before enabling the audit functionality for a document sequence, you must have created an audit table for the specific document sequence, using appropriate details. Enabling the audit functionality is permitted only for newly created document sequences. You can't audit document sequences that are already in use by a specific product.

For more information about defining a document sequence audit table, see the Oracle Fusion Applications Developer's Guide.

Related Topics

Managing Modules in Application Taxonomy: Points to Consider

Define Profile Options

Profile Options: Overview

Profile options are a set of preferences that you use to centrally manage the user interface settings and application behavior.

You can use the profile options to manage, for example:

- User preferences to specify language or currency.
- Configuration choices to change the user interface skin or appearance of fonts.
- Processing options to determine how much of an activity needs to be logged and at which level.

In the Setup and Maintenance work area, search for the **Define Profiles** task list. As an administrator or implementer, you can perform the following tasks:

Task Name	Function
Manage Profile Options	Create new profile options or modify existing profile options, except some which are predefined and restricted to prevent any modifications.
Manage Profile Categories	Group the profile options based on their functional similarities.
Manage Administrator Profile Values	Set the profile values for the enabled profile options to control application behavior.



For information on the predefined profile options, open the Setup and Maintenance work area, and use the Manage Profile Options task.

Hierarchy in Profile Levels: Explained

The hierarchy in profile levels determines the context for making a profile option effective.

You can enable a profile option at the following levels:

- Site level (lowest): The entire site of deployment
- Product level: A specific product component within the application
- User level (highest): A specific user

After you create or edit a profile option on the Manage Profile Options page, you must enable it. You can enable it at multiple levels. The setting at the highest enabled level takes precedence over the lower levels. User level is at the top of the hierarchy and always takes precedence over the settings at the product or site level.

On the Manage Administrative Profile Values page, set the profile value at any of the enabled levels of the profile option.

Example of Profile Option Hierarchy

The following table shows an example of setting the currency profile option at different levels.

Profile Level	Hierarchy	Value Corresponding to the Selected Profile Level	Currency
Site	Lowest	NA	Euro
Product	Higher than Site	General Ledger	UK Pound Sterling
User	Highest	John Smith	US Dollar

For this example, both John Smith and Jane Lee are General Ledger users. However, based on the profile settings, John Smith would see US Dollar as the default currency, whereas Jane Lee would see UK Pound Sterling. Mary, who is neither a General Ledger user nor has any user-level preference defined, will see Euro as the default currency.

Setting Profile Option Values: Procedure

Each profile option contains specific values that determine how it affects the application. You can add or modify the values for each profile option. Select or enter the value for one or more of the available levels (site, product, and user) so that each setting takes effect at the intended level.

Setting the Profile Value

- 1. In the Setup and Maintenance work area, search for and open the Manage Administrator Profile Values task.
- 2. Search for and select the profile option.



- 3. In the Profile Values section, click Add. A new row is added for you to specify the following conditions:
 - Profile Level: Specify the level at which the profile value is to be set. If the profile value applies to the entire site, select Site.
 - Product Name: If you select **Product** as the profile level, select a product and specify the associated profile value.
 - User Name: If you select **User** as the profile level, select the user name and specify the associated profile value.
 - o Profile Value: Select or enter the value corresponding to the selected profile level.
 - Note: For an existing entry, you can modify only the profile value.
- 4. Repeat step 3 to add more rows and set the profile values.
- Click Save and Close.
- Note: Changes in the profile values take effect for a user on the next sign in.

Creating and Editing Profile Options: Procedure

Use profile options to centrally manage user preferences and control the general function of applications. For example, you can control user preferences involving language, date, time, currency, and other similar general settings.

You can create a profile option and also determine the level at which that profile option takes effect. You can also define the profile values for the profile option. The profile values appear on the Manage Administrator Profile Values page when you select the profile option.

Creating a Profile Option

- 1. In the Setup and Maintenance work area, search for and open the **Manage Profile Options** task.
- 2. Click Actions New.
- 3. On the Create Profile Option page, fill all the fields with relevant details with specific attention to the following:
 - Use the SQL Validation field to provide an SQL statement that displays the permissible profile values to be used. Using an SQL statement, you can select the values from another table and display them as a list of values.

For example, to display the values Yes and No from a lookup table, you can use the following SQL statement:

select MEANING, LOOKUP_CODE from FND_LOOKUPS where LOOKUP_TYPE='YES_NO'

As a result, on the **Manage Administrator Profile Values** page, the profile values Yes and No are available for selection for that profile option.

- You can specify a date range to keep the profile option active during that period. Beyond the specified duration, the profile option automatically becomes inactive. If you no longer require the profile option, you must manually delete it from the **Manage Profile Options** page.
- 4. Click Save and Close.
- 5. On the Manage Profile Options page, search for the newly created profile option and from the results, select it.
- **6.** In the Profile Option Levels section, do the following:
 - a. Under **Enabled**, select the levels at which you want to enable the profile option.



- Note: You can enable a profile option at multiple levels, but a higher-level profile value overrides a lower-level value. Therefore, enable them only at the required levels.
- b. Under **Updatable**, select the profile level at which you want implementors to have update privileges. Leave the check box deselected if you don't want the implementors to modify the profile values (they appear in readonly mode).
- 7. Click Save and Close.

To edit a profile option that you created, search for it and edit the necessary details.

Managing Profile Categories: Points to Consider

You can create profile categories to group profile options based on their functional similarities and their use. In the Setup and Maintenance work area, search for the **Manage Profile Categories** task.

Profile categories help administrators or implementors in retrieving profile options using a search criterion on the **Manage Administrator Profile Values** page.

Managing Profile Categories

Consider the following options while managing profile categories:

- Create profile categories and add existing profile options to them
- Add newly created profile options to existing custom profile categories
- Note: While you can add a profile option to more than one category, some profile categories are predefined and restricted from any modifications. So, you can't edit them or add profile options to them.

Setting Display Sequence for the Profile Options

You must set the display sequence for each profile option that you add to a profile category. Display sequence determines the order in which the profile options appear in a search result, based on the profile category. You can set the sequence beginning with zero or one for the first profile option to display, and proceed sequentially to assign the values to the remaining profile options.

The following table demonstrates the effect of the display sequence on the profile options when they are retrieved as search results.

Profile Category	Included Profile Option - Assigned Display Sequence	Display Sequence of Profile Options in the Search Results
Attachments	Attachment File Directory - 2Indicate Attachments - 1	 Indicate Attachments Attachment File Directory

How can I access predefined profile options?

Search for predefined profile options using the Define Profiles task list:

1. In the Setup and Maintenance work area, search for the Manage Profile Options task and open it.



- 2. Enter any of the search parameters and click **Search**.
 - Tip: If you don't know the profile option code or the display name, use the **Application** or **Module** fields to filter search results.
- 3. Click a profile option to view its details.

Define Attachments

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 Uls or create entities, for example when developing custom Uls.

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

- Modules in Application Taxonomy: Explained
- 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 Define Attachments

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.

Related Topics

• Modules in Application Taxonomy: Explained



17 Trees Setup

Overview

Trees are hierarchical data models that you can use to organize data, apply business rules, control data access, and improve performance while querying. For example, an application maintains data of an organization called Vision Corporation that has two departments: Marketing and Finance. The Finance department has two functional divisions: Receivables and Payables. You can define a tree for Vision Corporation to establish a hierarchy across its departments, and their respective functional divisions. You can use the hierarchy to manage data at various levels of the organization.

In the Setup and Maintenance work area, search for and use the Manage Trees and Tree Versions task to organize data into hierarchies.

Tree Structures

As the name suggests, tree structures provide you the framework to organize data such that you can establish a hierarchy for use by the tree. So, similar to a template, a tree structure guides the creation of a tree.

Tree

A tree is an instance of the tree structure. The root node is the topmost nodal point of a tree. Child nodes branch off from the root node. Child nodes at the same level, branching off from a common parent node, are called siblings. Leaves are details branching off from a node but not extending further down the tree hierarchy. You can create trees for multiple data sources and share them across applications.

Tree Versions

A tree by default has only one version. If required, you can create and maintain more than one editable tree version. At any point, only one tree version must be active. If you edit an existing version, it changes from active to draft. To use it again, you must set it to active. Similar to any other version control system, versions of trees are maintained to track all the changes that a tree undergoes in its life cycle.

Tree Labels

Tree labels are short names given to trees and tree structures. You can label the tree versions for better accessibility and information retrieval. When nodes are created in a tree, the existing tree labels are automatically assigned to the new tree nodes. You can use any table to store the labels and register the label data source with the tree structure.

In the Setup and Maintenance work area, search for and use the following tasks to work with trees:

• Manage Tree Structures: To create and update tree structures. You must first define a tree structure to create a tree.



- Manage Trees and Tree Versions: To create and update trees and their versions.
- Manage Tree Labels: To create and update tree labels.

Manage Tree Structures

Tree Structures: Explained

A tree structure defines the hierarchy for creating trees and prescribes rules based on which trees are created, versioned, and accessed. You can associate multiple data sources with a tree structure. A tree is an instance of this hierarchy. Every tree structure can contain one or more trees.

You can create tree structures specific to an application but you can share tree structures across applications. If you apply version control to the tree structure, it is carried over to the trees that are based on the tree structure. Each tree version contains at least one root node. Occasionally, a tree version may have more than one root node.

An administrator controls the access to tree structures through a set of rules that are periodically audited for validity.

Tree Structure Definition: Points to Consider

While creating a tree structure, you must specify important details on the Create Tree Structure: Specify Definition page. As the source of the tree structure, you may either select the predefined tree structures and proceed with the definition or create custom tree structures.

Tree Node Selection

The data in **Tree Node** table maps to the data in nodes of the tree structure. You must select the correct and most appropriate tree node table to define the tree structure, based on which you establish the tree hierarchy. This selection also affects the level of security that is set on a tree node and its child entities.

Tree Sharing Mode

Use the following options to determine the mode of sharing a tree structure across the applications.

- Open: Indicates that the tree is associated with all reference data sets.
- Set ID: Indicates that the tree is associated with a specific reference data set.

Customization

You can customize the predefined tree structures as well as those you create. However, customizing a predefined tree structure is restricted and permitted through additional privileges. Customization is limited to specific tree nodes and below in the tree hierarchy.

Multiple Tree Versions

Although multiple tree versions can exist together, Oracle recommends only one version be active at any given time. However, if required, you can have more tree versions to be in the active state for the same date range. You can use this flexibility to select the tree version you want to implement.



Managing Tree Structures: Points to Consider

You can create, edit, and delete tree structures. You can also change the status of a tree structure and audit the changes.

Creating and Editing Tree Structures

When you edit an active tree structure, the status of the tree structure and all associated trees and their versions changes to draft. To reuse a tree structure, create a copy of the tree without copying the associated trees and tree versions. After making changes, set the status again to active. If you delete a tree structure, all the associated trees and tree versions are automatically deleted.

For information about working with the offering-specific predefined tree structures, refer to the relevant product documentation.

Status

When you change the status of a tree structure, the status of the trees and tree versions associated with that tree structure also changes.

The following table lists the different statuses of a tree structure.

Status	Meaning
Draft	In a modified state, or not yet in use.
Active	In use, indicating that one or more trees or tree versions are created from the tree structure.
Inactive	Not in use.

Tree Structure Audit Results: Explained

Use the tree structure audit results to verify the tree structure's correctness and data integrity. The audit results include the following details:

- The name of the validator, which is a specific validation check
- The result of the validation, including a detailed message
- Corrective actions to take if there are any validation errors

Running an Audit

Setting the status of a tree structure to active automatically triggers an audit of that tree structure. To manually trigger an audit, select Audit from the Actions menu on the Manage Tree Structures page. The Tree Structure Audit Result table shows a list of validations that ran against the selected tree structure.

Audit Validators

The following table lists the validators used in the audit process and describes what each validator checks for. It also lists possible causes for validation errors and suggests corrective actions.



Validator	Page	Description (what is validated)	Possible Cause for Validation Failure	Suggested Corrective Action
Restrict By Set ID	Manage Tree Structures: Specify Data Sources	If you select the Reference Data Set check box for the Restrict Tree Node List of Values Based on option, each of its data source view objects must have a reference data set attribute.	Even when the check box is selected, one or more data source view objects doesn't contain a reference data set attribute.	If reference data set restriction is required for this tree structure, include a reference data set attribute on all data sources. Otherwise, deselect the check box.
Available Label Data Sources	Manage Tree Structures: Specify Data Sources	If you select a list item from Labeling Scheme to specify a labeling scheme, the label data source view object specified for each data source must be accessible. Also, the primary keys must be valid. This restriction doesn't apply if you select None from the list.	 Any of the specified label data source view objects doesn't exist. Any of the specified label data source view objects doesn't have primary keys. When a label data source view object is initially defined, the database registers the primary keys for the view object. If the view object is later modified such that its primary keys no longer match the primary keys that were registered earlier, this validation fails. 	Correct the specified label data source view object. Correct the primary keys of the specified label data source view object. Do one of the following: Correct the primary keys in the label data source view object to match the primary keys that were earlier registered in FND_TS_DATA_SCORRECT The primary keys registered in that table to match the new view object definition.
Row Flattened Table Name	Manage Tree Structures: Specify Performance Options	You must specify a valid row flattened table for the tree structure. It can either be the standard row flattened table FND_TREE_NODE_RF or a custom table.	 The specified table doesn't exist in the database. The specified table doesn't contain the same columns as the FND_TREE_NODE_R table. 	Correct the row flattened table definition.
Available Data Sources	Add Data Source	Each data source view object specified for the tree structure must be accessible, and all its primary key attributes must be valid.	 Any of the specified data source view objects doesn't exist. 	 Correct the specified data source view object. Correct the duplicate column



Validator	Page	Description (what is validated)	Possible Cause for Validation Failure	Suggested Corrective Action
			When you define a data source view object, keep the Use non-defined primary key columns check box deselected. The database automatically registers the primary keys for the view object. Select this check box if you want the database to register the primary keys you specify. However, if the registered primary keys contain any duplicates, this validation fails. The Use non-defined primary key columns check box is selected in a data source, but the list of specified primary keys defined in the corresponding data source view object. Any common attribute that exists in both the data type in both view objects.	in the registered primary keys. Correct the primary keys of the specified data source view object. Correct any mismatch in data types.
Column Flattened Table Name	Manage Tree Structures: Specify Performance Options	You must specify a valid column flattened table for the tree structure. It can either be the standard row flattened table FND_TREE_NODE_CF or a custom table.	The specified table doesn't exist in the database. The specified table doesn't contain the same columns as the FND_TREE_NODE_C table.	Correct the column flattened table definition.
Restrict by Date	Manage Tree Structures: Specify Data Sources	If you select the Date Range check box for the Restrict Tree Node List of Values Based	Even when the check box is selected, one or more of its data source view objects doesn't contain effective start	If the date restriction is required for this tree structure, include the effective start date and effective end date



Validator	Page	Description (what is validated)	Possible Cause for Validation Failure	Suggested Corrective Action
		on option for a tree structure, each of its data source view objects must have effective start date and end date attributes. This validation doesn't take place when the check box isn't selected.	date and end date attributes.	attributes on all data sources. Otherwise, deselect the check box.
Tree Node Table Name	Manage Tree Structures: Specify Definition	You must specify a valid tree node table for the tree structure. It can either be the standard row flattened table FND_TREE_NODE or a custom table.	No table is specified in the Tree Node Table field. The specified table doesn't exist in the database. The specified table doesn't contain the same columns as the FND_TREE_NODE table.	Correct the tree node table definition.

Adding Tree Nodes: Points to Consider

Tree nodes are points of data convergence where a tree branches into levels. Nodes are the building blocks of a tree structure and are attached to tree versions. Whenever you create or edit a tree version, you need to specify its tree node.

In the Setup and Maintenance work area, search for the Define Trees task and access the Manage Trees and Tree Versions page.

Managing Tree Nodes

You can create, modify, or delete tree nodes on the **Tree Version: Specify Nodes** page. To add a tree node, ensure that the tree structure with which the tree version is associated is mapped to a valid data source. You can also duplicate a tree node if the multiple root node feature is enabled.

Node Levels

Usually, the nodes at a particular level represent similar information. For example, in a tree that reflects the organizational hierarchy, all nodes representing divisions appear at one level and all the department nodes on another. Similarly, in a tree that organizes a user's product catalog, the nodes representing individual products might appear at one level and the nodes representing product lines on the immediate higher level.

The following node levels are in use:

- Root node: The topmost node in the tree structure
- Parent node: The node that branches off into other nodes
- Child node: The node that is connected to a node higher in hierarchy (parent node)
- Sibling node: Nodes that are at the same level and belong to the same parent node
- Leaf node: Entities branching off from a node but not extending further down the tree hierarchy



Node Types

A tree node has the following node types.

- Single: Indicates that the node is a value by itself.
- Range: Indicates that the node represents a range of values and possibly could have many children. For example, a tree node representing account numbers 10000 to 99999.
- Referenced Tree: Indicates that the tree node is actually another version for the tree based on the same tree structure, which is not physically stored in the same tree. For example, a geographic hierarchy for the United States can be referenced in a World geographic hierarchy.

Trees and Data Sources: How They Work Together

Data sources are the foundation of tree management. Tree structures, trees, and tree versions establish direct and real-time connectivity with the data sources. Changes to the data sources immediately reflect on the **Manage Trees and Tree Versions** page and wherever the trees are being used.

Metadata and Data Storage

Tree structures contain the metadata of the actual data and the core business rules that manifest in trees and tree versions. You can select and enable a subset of trees to fulfill a specific purpose in that application.

Access Control

Source data is mapped to tree nodes at different levels in the database. Therefore, the changes you make to the tree nodes affect the source data. Access control set on trees prevents unwanted data modifications in the database. Access control can be applied to the tree nodes or anywhere in the tree hierarchy.

Specifying Data Sources for Tree Structures: Points to Consider

The data sources provide the items for establishing hierarchy in a tree structure. In the tree management infrastructure, these data sources are Oracle ADF business components view objects, which are defined by application development.

Labeling Schemes

Selecting a labeling scheme determines how the tree nodes are labeled. You may select a labeling scheme to assign at the data source level, at the parent node level, or keep it open for customers assignment. You may also choose not to have any labeling scheme. However, if you decide to use any of the labeling schemes, select the following additional options, to restrict the list of values that appear under the selected tree node.

- Allow Ragged Nodes: To include nodes that have no child nodes, and are shorter than the remaining nodes in the
 entire hierarchy.
- Allow Skip Level Nodes: To include nodes that are at the same level but have parent nodes at different levels.

Restriction of Tree Node Values

You can decide the depth of the tree structure by selecting an appropriate value from the list. Keeping the depth limit open renders an infinite list of values.



Using the following options, you can restrict the list of values that appear for selection under a specific tree node.

- Date Range: Specifies whether a selection of nodes should be restricted to the same date range as the tree
 version.
- Allow Multiple Root Nodes: Allows you to add multiple root nodes when creating a tree version.
- Reference Data Set: Specifies whether a selection of nodes should be restricted to the same set as the tree.

Data Source Values and Parameters

Tree data sources have optional data source parameters with defined view criteria and associated bind variables. You can specify view criteria as a data source parameter when creating a tree structure, and edit the parameters when creating a tree. Multiple data sources can be associated with a tree structure and can have well-defined relationships among them.

Note: Parameter values customized at the tree level override the default values specified at the tree-structure level.

The data source parameters are applied to any tree version belonging to that data source, when performing node operations on the tree nodes. Data source parameters also provide an additional level of filtering for different tree structures. The tree structure definition supports three data source parameter types.

- Bound Value: Captures any fixed value, which is used as part of the view criteria condition.
- Variable: Captures and binds a dynamic value that is being used by the data source view object. This value is used by the WHERE condition of the data flow.
- View Criteria: Captures the view criteria name, which is applied to the data source view object.

You can also specify which of the data source parameters are mandatory while creating or editing the tree structure.

View objects from the Oracle ADF business components are used as data sources. To associate the view object with the tree structure, you can pick the code from Oracle ADF business component view objects and provide the fully qualified name of the view object, for example, oracle.apps.fnd.applcore.trees.model.view.FndLabelVO.

Specifying Performance Options for a Tree Structure: Points to Consider

Tree structures are heavily loaded with data. As a tree management guideline, use the following settings to improve performance of data rendering and retrieval.

- Row Flattening
- Column Flattening
- Column Flattened Entity Objects
- Bl View Objects

Row Flattening

Row flattening optimizes parent-child information for run-time performance by storing additional rows in a table for instantly finding all descendants of a parent without initiating a CONNECT BY query. Row flattening eliminates recursive queries, which allows operations to perform across an entire subtree more efficiently.

To store row flattened data for the specific tree structure, users can either use the central **fnd_tree_node_rf** table or they can register their own row flattened table. For example, in a table, if Corporation is the parent of Sales Division (Corporation-Sales



Division), and Sales Division is the parent of Region (Sales Division-Region), a row-flattened table contains an additional row with Corporation directly being the parent of Region (Corporation-Region).

Column Flattening

Column flattening optimizes parent-child information for runtime performance by storing an additional column in a table for all parents of a child.

To store column flattened data for the specific tree structure, users can either use the central <code>fnd_tree_node_cf</code> table or they can register their own column flattened table. For example, in a table, if Corporation is the parent of Sales Division (Corporation-Sales Division), and Sales Division is the parent of Region (Sales Division-Region), a flattened table in addition to these columns, contains three new columns: Region, Sales Division, and Corporation. Although positioned next to each other, the column Region functions at the lower level and Corporation at the higher level, retaining the data hierarchy.

Column Flattened Entity Object

In the absence of a column-flattened table, if you need to generate the business component view objects for your tree structure for the flattened table, use the tree management infrastructure to correctly provide the fully qualified name of the entity object for the column flattened table.

BI View Object

View objects from Business Intelligence can be used as data sources, eliminating the need to create new types of data sources. This field is to store the fully qualified name for the BI view object generated by the tree management for business intelligence reporting and usage The BI view object is a combination of the tree data source and column flattened entity. Using this option prevents data redundancy and promotes greater reuse of existing data, thereby improving the performance of the tree structure.

Search View Object

Specify the full name of the view object for the tree node to ensure that search operations performed on the tree node are efficient.

Manage Tree Labels

Tree Labels: Explained

Tree labels are tags that are stored on tree nodes. You can store labels in any table and register the label data source with the tree structure. When a labeling scheme is used for trees, the selected labels are stored in the tree label entity, and each tree node contains a reference to a tree label in the labeling scheme.

The following table lists the three ways in which tree labels are assigned to the tree nodes.

Labeling Scheme	Description
Level	Labels that are automatically assigned based on the data source to which the tree node belongs. A level label points to a specific data source. For example, in a tree that reflects the organizational hierarchy of an enterprise, all division nodes appear on one level and all department nodes on another.
Group	Labels that you can arbitrarily assign to tree nodes.



Labeling Scheme	Description
Depth	Labels that are automatically assigned based on the depth of the tree node within the tree. No manual assignment is performed.
	Note: In an unbalanced hierarchy, a level may not be equal to depth.

Manage Trees and Tree Versions

Managing Trees and Tree Versions: Points to Consider

You can create and edit trees and tree versions depending upon the requirement. A tree can have one or more tree versions. When changes are made to an existing tree, a new version is created and published.

Creating and Editing Trees

Trees are created based on the structure defined in the tree structure. You can create trees, modify existing trees, and delete trees. If you want to copy an existing tree, you can duplicate it. You can also select and copy the associated tree versions.

Creating a tree involves specifying the tree definition and specifying the labels that are used on its nodes. If the selected tree structure has data sources and parameters defined for it, they appear on the page allowing you to edit the parameter values at the tree node level.

Note: Parameter values customized at the tree level will override the default values specified at the tree-structure level.

Creating and Editing Tree Versions

Tree versions are created at the time of creating trees. Each tree must contain a version.

Editing an existing tree provides you with the option of updating the existing version. You can also edit the existing version that lies nested under the tree in the search results.

When you edit a tree version bearing Active status, the status changes to Draft until the modifications are saved or canceled.

Tree Version Audit Results: Explained

Use the tree version audit results to verify the tree version's correctness and data integrity. The audit results include the following details:

- · The name of the validator, which is a specific validation check
- · The result of the validation, including a detailed message
- Corrective actions to take if there are any validation errors



Running an Audit

An audit automatically runs whenever a tree version is set to active. You can also manually trigger an audit on the Manage Trees and Tree Versions page, using **Actions - Audit**. The Tree Version Audit Result table shows a list of validations that ran against the selected tree version.

Validation Details

The following table lists the validators used in the audit process and describes what each validator checks for. It also lists possible causes for validation errors and suggests corrective actions.

Validator	Description (what is checked)	Possible Cause for Validation Failure	Suggested Corrective Action
Effective Date	The effective start and end dates of the tree version must be valid.	The effective end date is set to a value that is not greater than the effective start date.	Modify the effective start and end dates such that the effective start date is earlier than the effective end date.
Root Node	On the Manage Tree Structures: Specify Data Sources page, if the Allow Multiple Root Nodes check box for the Restrict Tree Node List of Values Based on option is not selected, and if the tree structure is not empty, the tree version must contain exactly one root node. This validation does not take place if the check box is selected.	Even if the check box is deselected, the tree version has multiple root nodes.	Modify the tree version such that there is exactly one root node.
Data Source Max Depth	For each data source in the tree structure, on the Data Source dialog box, if the data source is depth-limited, the data in the tree version must adhere to the specified depth limit. This validation doesn't apply to data sources for which the Maximum Depth field is set to Unlimited .	The tree version has data at a depth greater than the specified depth limit on one or more data sources.	Modify the tree version such that all nodes are at a depth that complies with the data source depth limit.
Duplicate Node	On the Data Source dialog box, if the Allow Duplicates check box isn't selected, the tree version must not contain more than one node with the same primary key from the data source. If the check box is selected, duplicate nodes are permitted.	Even when the check box is deselected, the tree version contains duplicate nodes.	Remove any duplicate nodes from the tree version.
Available Node	All nodes in the tree version must be valid and available in the underlying data source.	A node in the tree version doesn't exist in the data source. Deleting data items from the data source without removing the corresponding nodes from the tree version can result in orphaned nodes	Remove any orphaned nodes from the tree version. Update tree reference nodes so that they reference existing tree versions.



Validator	Description (what is checked)	Possible Cause for Validation Failure in the tree version. For example, if you added node A into your tree version, and subsequently deleted node A from the data source without removing it from the tree version, the validation fails. The tree version contains a tree reference node, which references another tree version that does not exist.	Suggested Corrective Action
Node Relationship	All nodes must adhere to the relationships mandated by the data sources registered in the tree structure.	The tree structure has data sources arranged in a parent-child relationship, but the nodes in the tree don't adhere to the same parent-child relationship. For example, if the tree structure has a Project data source with a Task data source as its child, Task nodes must always be under Project nodes in the tree version. This validation fails if there are instances where a Project node is added as the child of a Task node.	Modify the tree version such that the nodes adhere to the same parent-child relationships as the data sources.
SetID Restricted Node	On the Manage Tree Structures: Specify Data sources page, if the Set ID check box is selected to enable the Restrict Tree Node List of Values Based on option for each tree node, the underlying node in the data source must belong to the same reference data set as the tree itself. This restriction doesn't apply when the check box is not selected.	Even when the check box is selected, the tree version has nodes whose data source values belong to a different reference data set than the tree.	Modify the tree version such that all nodes in the tree have data sources with reference data set matching that of the tree.
Label Enabled Node	On the Manage Tree Structures: Specify Data Sources page, if a labeling scheme is specified for the tree structure by selecting a list item from the Labeling Scheme list box, all nodes must have labels. This restriction doesn't apply when you select None from the Labeling Scheme list box.	The tree structure has a labeling scheme but the tree version has nodes without labels.	Assign a label to any node that doesn't have a label.
Date Restricted Node	On the Manage Tree Structures: Specify Data Sources page, if the Date Range check box is selected to enable the Restrict Tree Node List of Values Based on option for a tree	Even when the check box is selected, there are data source nodes that have a date range beyond the tree version's effective date range. For example, if the tree version	Ensure that all nodes in the tree version have effective date range for the effective date range for the tree version.



Validator	Description (what is checked)	Possible Cause for Validation Failure	Suggested Corrective Action
	structure, each node in the underlying data source must have an effective date range same as the effective date range of the tree version. This restriction doesn't apply if the check box isn't selected.	is effective from Jan-01-2012 to Dec-31-2012, all nodes in the tree version must be effective from Jan-01-2012 to Dec-31-2012 at a minimum. It is acceptable for the nodes to be effective for a date range that extends partly beyond the tree version's effective date range (for example, the node data source value is effective from Dec-01-2011 to Mar-31-2013). It isn't acceptable if the nodes are effective for none or only a part of the tree version's effective date range (for example, the node data source value are effective only from Jan-01-2012 to June-30-2012).	
Multiple Active Tree Version	On the Manage Tree Structures: Specify Definition page, if the Allow Multiple Active Tree Versions check box isn't selected for the tree structure, there must not be more than one active tree version under a tree at any time. This restriction doesn't apply if the check box is selected.	Even when the check box isn't selected, there is more than one active tree version in the tree for the same date range.	Set no more than one tree version to Active within the same date range and set the others to inactive or draft status.
Range Based Node	On the Data Source dialog box, if the Allow Range Children check box isn't selected, range-based nodes are not permitted from that data source. This restriction doesn't apply if the check box is selected.	Even when the check box isn't selected, there are range-based nodes from a data source.	Ensure that any range nodes in your tree version are from a data source that allows range children.
Terminal Node	On the Data Source dialog box, if the Allow Use as Leaves check box isn't selected, values from that data source can't be added as leaves (terminal nodes) to the tree version. This restriction doesn't apply if the check box is selected.	Even when the check box isn't selected, values from a data source are added as leaf nodes (terminal nodes).	Modify the tree version such that all terminal nodes are from data sources for which this check box is selected.
Usage Limit	On the Data Source dialog box, if the Use All Values option is selected to set the Usage Limit for the data source, every value in the data source must appear as a node in the tree. This restriction doesn't apply if None option is selected.	Even if the Use All Values option is selected, there are values in the data source that aren't in the tree version.	For each data source value that isn't yet available, add nodes to the tree version.





18 Flexfields Setup

Overview

A flexfield is an extensible set of placeholder fields associated with business objects and placed on the application pages. You can use flexfields to extend the business objects and meet enterprise data management requirements without changing the data model or performing any database programming. Flexfields help you to capture different data on the same database table.

For example, an airline manufacturer may require specific attributes for its orders that aren't predefined. Using a flexfield for the order business object, you can create and configure the required attribute.

Flexfields that you see on the application pages are predefined. However, you can configure or extend the flexfields, or modify their properties. Users see these flexfields as field or information attributes on the UI pages. To use flexfields, search for and open the **Define Flexfields** task list in the Setup and Maintenance work area. You can use the following tasks contained within it:

- Manage Descriptive Flexfields: Expand the forms on the application page to accommodate additional information that is important and unique to your business. You can use a descriptive flexfield to collect custom invoice details on a page displaying invoices.
- Manage Extensible Flexfields: Establish one-to-many data relationships and make application data contextsensitive. The flexfields appear only when the contextual data conditions are fulfilled. Thus, extensible flexfields provide more flexibility than the descriptive flexfields.
- Manage Key Flexfields: Store information combining several values, such as a number combination. The key flexfields represent objects such as accounting codes and asset categories.
- Manage Value Sets: Use a group of values to validate the data entered in the flexfields.
 - Note: You can manage value sets within the Manage Descriptive Flexfields or Manage Extensible Flexfields tasks.

For more information about specific predefined flexfields, open the Setup and Maintenance work area, and use the tasks in the Define Flexfields task list.

Types of Flexfields

The following three types of flexfields provide a means to customize the applications features without programming:

- Descriptive
- Extensible
- Key

Related Topics

- Descriptive Flexfields: Explained
- Extensible Flexfields: Explained



- Key Flexfields: Explained
- Modules in Application Taxonomy: Explained

Flexfield Components: Explained

A flexfield is made up of several data entities that store and render information pertaining to flexfield configuration.

Flexfields are made up of the following components:

- Segments
- Value Sets
- Contexts
- Structures

Segments

A segment is a field within a flexfield and represents a single table column of your database. When configuring a flexfield, define the appearance and meaning of individual segments. Segments represent attributes of information. Segments can appear globally wherever the flexfield is implemented, or based on a structure or context. Each segment captures a single atomic value and represents an attribute of information.

The characteristics of a segment vary based on the type of flexfield in which it's used.

- In key flexfields, a segment describes a characteristic of the entity. For example, a part number that contains details about the type, color, and size of an item.
- In a descriptive or extensible flexfield, a segment represents an information attribute on the application page.
 For example, details about a device containing components, some of which are global while the remaining are contextually dependent on the category of the device.

Value Sets

Users enter values into segments while using an application. A value set is a named group of values that validate the content of a flexfield segment. You configure a flexfield segment with a value set to enforce entries of only valid values for that segment.

The configuration involves the following tasks:

- Defining the values in a value set, including characteristics such as the length and format of the values.
- Specifying formatting rules or values from an application table or predefined list.

Multiple segments within a flexfield, or multiple flexfields, can share a single value set.

Contexts

Context-sensitive flexfield segments are available to an application based on a context value. You define contexts as part of configuring a flexfield. Users see global segments as well as any context-sensitive segments that apply to the selected context value.



In descriptive flexfields and extensible flexfields, you can reuse the context-sensitive segments that are based on the database columns, in multiple contexts.

Structures

Key flexfields have structures. Each key flexfield structure is a specific configuration of segments. Adding or removing segments, or rearranging their order, produces a different structure. You can reuse the segments that are based on the database columns, in multiple structures.

Configuring Flexfields: Overview

Configuring a flexfield ranges from identifying the need for extending a business object with custom attributes to integrating the custom attributes into the deployment. In the case of key flexfields, configuring the flexfield involves identifying value set assignments and determining segment structures.

Overall Process for Configuring Custom Attributes

For descriptive and extensible flexfields, the overall configuration process involves the following:

- 1. Use the Highlight Flexfields feature from the Administration menu to find flexfields on pages associated with business objects.
- 2. Plan the flexfield configuration.
- 3. Plan flexfield validation.
- 4. Define the attributes by configuring the flexfield segments.
 - a. Use the Manage Extensible Flexfields or Manage Descriptive Flexfields tasks, or use the Configure Flexfield icon button directly on the page where the flexfield is highlighted. For simple configurations, use the Add Segment, Add Context Value, and Edit Segment icon buttons directly on the page where the flexfield is highlighted.
 - **b.** Optionally, validate the flexfield configuration.
 - **c.** Optionally, deploy the flexfield to a sandbox for initial testing.
- **5.** Deploy the flexfield to the mainline metadata to display the custom attributes on the application pages and to make them available for integration with other tools such as Oracle Business Intelligence.
- 6. Perform the necessary steps to integrate the custom attributes into the technology stack.

A simple configuration is limited to such actions as adding a format-only field or adding a field with a basic list of values.

Overall Process for Configuring Custom Keys

Using key flexfields, you can configure intelligent key codes comprised of meaningful parts according to your business practices. You configure the key flexfield to have one segment for each part that makes up your key code.

For key flexfields, the overall configuration process involves the following:

- 1. Use the Highlight Flexfields feature from the Administration menu to find flexfields on pages associated with business objects.
- 2. Plan the flexfield configuration.



- 3. Plan the flexfield validation.
- 4. Define the value sets before configuring the key flexfield segments by going to the Manage Value Sets task.
- 5. Define the key flexfield structures and their segments, and define structure instances for each structure.
 - **a.** Use the Manage Key Flexfields task or the **Configure Flexfield** icon button directly on the page where the flexfield is highlighted.
 - **b.** Optionally, validate the flexfield configuration.
 - c. Optionally, deploy the flexfield to a sandbox for initial testing.
- **6.** Deploy the flexfield to the mainline metadata to display it on the application pages and to make it available for integration with other tools such as Oracle Business Intelligence.
- 7. Perform the necessary steps to integrate the flexfield into the technology stack.

Related Topics

• Extensible Flexfields: Explained

Descriptive Flexfields: Explained

Key Flexfields: Explained

Flexfields at Run Time: Explained

Business objects have an associated descriptive or extensible flexfield. Using these, you can create custom attributes for the business object at run time. Some business objects have an associated key flexfield for configuring flexible multiple part keys.

Finding Flexfields on a Page

At run time, the custom attributes you define as flexfield segments appear in the application page just like any other attribute. However, each type of flexfield appears in a different way.

The following characteristics help you determine the type of flexfield on the application page:

- Descriptive flexfield segments appear as label and field pairs or as a table of fields that correspond to the column headers. The fields represent the flexfield segments and accept values that derive from the segment's assigned value set.
- Extensible flexfield segments appear grouped within labeled regions, where each grouping is a context and the region labels are the context names.
- Key flexfields appear in the application page as a field with a key flexfield icon, where the field's value is a collection
 of segments.

To locate flexfields on a page, in the global area, select your user name and under the Settings and Actions menu, select **Highlight Flexfields**. The page renders in a special mode, displaying the location of flexfields, if any, on the page. Do the following:

- Hover over the Information icon to view flexfield details.
- Click the Configure Flexfield icon to manage the flexfield using the Manage Flexfields task.
- Click the Add Context Value, Add Segment, or Edit Segment icons to add a context value or edit a global or context-sensitive flexfield segment. This applies to both descriptive and extensible flexfields.



Note: Not all flexfields are available for creating custom attributes. For example, some flexfields are protected, and you either can't edit their configurations at all, or can do only limited changes to them. Consult the product-specific documentation in Oracle Fusion Applications Help to verify whether there are any restrictions on using the flexfield.

All segments of a single flexfield are grouped together by default. The layout and positions of the flexfield segments depend on where the application developer places the flexfield on the page. Flexfields may also be presented in a separate section of the page, in a table, or on their own page or a dialog box. You can use Oracle Composer to edit the layout, position, or other display features of the flexfield segments.

When you no longer want to view the flexfields on a page, select **Unhighlight Flexfields** from the Administration menu.

Customizing Flexfields Using Page Composer: Explained

Using Page Composer, you can create customizations to flexfields that are specific to a page.

In Page Composer, to customize:

- Extensible flexfields, open the page in Source view, and look for a region that is bound to an
 EffContextsPageContainer task flow. This is the container for the extensible flexfield attributes and contexts. To view
 the flexfield code and identifying information, open the properties panel for the region. To customize any component
 within the region, select the desired tag and click Edit.
- Descriptive flexfields, open the page in Source view, and look for <descriptiveFlexfield> elements. Open the properties panel for the element to view the flexfield code and identifying information. Within the properties panel, you may customize properties for the global and context-sensitive segments or re-order the segments on the page.

Flexfields and Oracle Applications Cloud Architecture: How They Work Together

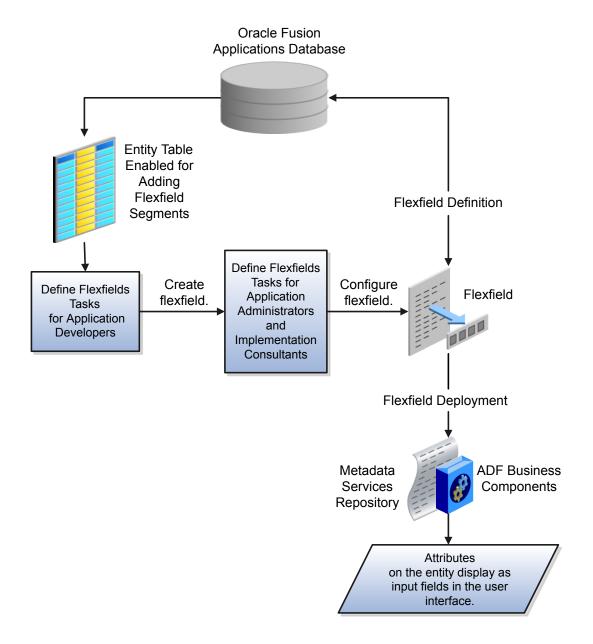
To capture additional data, administrators or implementors configure flexfield segments that represent attributes of business objects. Business objects are enabled for both descriptive flexfields and extensible flexfields.

The following figure shows the layers involved in configuring a flexfield:

- The business entity table and metadata in the database.
- The ADF business component objects. These are derived from the metadata and stored in Oracle Metadata Services (MDS) repository.
- The user interface where fields defined by the flexfield segments are rendered.



The flexfield definition consists of all the metadata defined during configuration and stored in the database.



Application developers create a flexfield and register it so that it's available for configuration. Administrators and implementation consultants configure segments and other properties of the available flexfields. This information is stored as additional flexfield metadata in the database. Deploying the flexfield generates ADF business components based on the flexfield metadata in the database.

The following aspects are important in understanding how flexfields and Oracle Applications Cloud architecture work together:

- Integration
- Deployment



- Import and export
- Run time
- Patching

Integration

The attributes that you add by configuring flexfields are available throughout the Oracle Fusion Middleware technology stack. You can use the flexfield segment's Application Programming Interface (API) to identify segments and integrate the flexfields in the following:

- User interface pages
- Service-oriented Architecture (SOA) infrastructure
- Oracle Business Intelligence
- Extended Spread Sheet Database (ESSbase)

Flexfield configurations are preserved across application updates.

Deployment

The metadata for the flexfield is stored in the application database as soon as you save your configuration changes. Deploying the flexfield generates the ADF business components so that the run time user interface reflects the latest flexfield definition in the metadata.

Importing and Exporting

Using the Setup and Maintenance work area, you can import and export flexfields across the implementation site. The deployment status must be either Deployed or Deployed to sandbox. Therefore, before you attempt migration, verify and ensure that a flexfield is successfully deployed.

Run Time

The latest definitions of a flexfield reflect on the user interface at run time only if the flexfield is deployed. When the user interface accesses a business object, the deployed flexfield definition identifies the attributes associated with the captured values. On a page, if you add display customizations for a flexfield using Oracle Composer, the same flexfield segments can appear differently on different pages.

Patching

Flexfield configurations are preserved during patching and upgrading.

Flexfields and Value Sets: Highlights

Before you use flexfields to create custom attributes, you should be familiar with the customization layers and the customization life cycle of Oracle Applications Cloud. In addition to the extensive help content available about configuring flexfields, consider the resources below for adding flexfields to business components and alternatives to flexfields where flexfields can't be enabled.



For more information about specific predefined flexfields, open the Setup and Maintenance work area, and use the tasks in the Define Flexfields task list. For customization not available through the tasks and user interface pages, contact My Oracle Support at http://www.oracle.com/pls/topic/lookup?ctx=acc=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc=trs if you are hearing impaired.

Note: Don't use Oracle JDeveloper to customize flexfields.

Before Configuring Flexfields

You can add custom attributes to a business object using a flexfield, if a flexfield has been registered for that object by developers.

 For Oracle Sales Cloud, use Application Composer to add custom attributes instead of using descriptive and extensible flexfields.

Deploying Flexfields

- For information about synchronizing the updated XML schema definition (XSD) files in MDS repositories for each SOA application, refer to the Oracle Fusion Applications Extensibility Guide for Developers.
 See: Customizing SOA Composite Applications
 - Oracle ADF services used by SOA composites expose the Web Services Description Language (WSDL) schemas where deployed flexfields are stored.

Oracle Business Intelligence

- For information about importing business intelligence-enabled flexfield changes into the Oracle Business Intelligence repository, refer to the Oracle Transactional Business Intelligence Administrator's Guide.
 - See: Enabling Flexfields for Business Intelligence Reporting
 - See: Importing Changes to Flexfields Automatically

Related Topics

- Exporting and Moving Customizations: Points to Consider
- Defining Fields: Explained

Flexfield Management

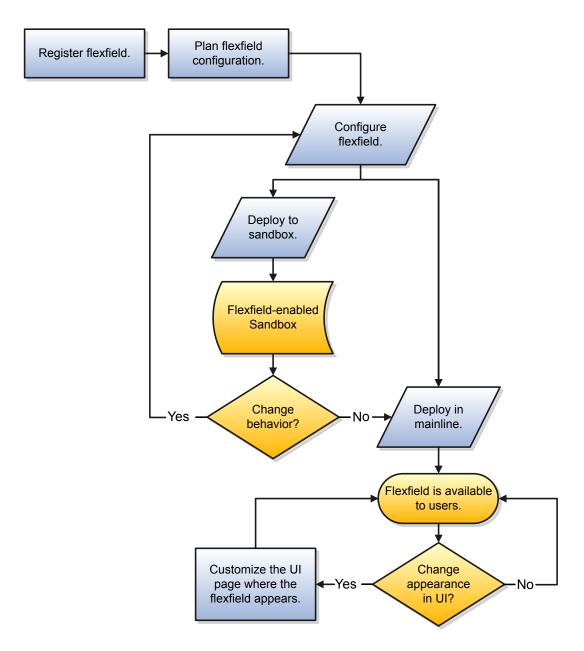
Managing Flexfields: Points to Consider

Managing flexfields involves registering, planning, and configuring flexfields.

You plan and configure the registered flexfields provided in your applications by applications developers. How you configure flexfield segments determines how the flexfield segments appear to users. Optionally, you can customize the UI page to change how the flexfield segments appear to users on that page.



The figure shows the processes involved in making flexfields available to users. The tasks in the Define Flexfields activity let administrators configure and deploy flexfields. After you configure and deploy a flexfield to a sandbox, deploy it again to the mainline metadata so that it's available to the users.



Consider the following aspects of managing flexfields:

- Registering flexfields
- Planning flexfields
- Configuring flexfields
- Enabling a flexfields segment for business intelligence
- Deploying flexfields



- Optionally changing a flexfield segment's appearance in a user interface page
- Identifying flexfields on a run time page and troubleshooting

Registering Flexfields

A flexfield must be registered before it can be configured. Therefore, application development registers flexfields so that they are available to administrators and implementation consultants for configuration. The registration involves reserving columns of entity tables for use in flexfields. For more information about registering flexfields, see Oracle Fusion Applications Developer's Guide.

Planning Flexfields

Before you begin planning flexfields, determine what type is appropriate to your needs, and which business objects are available for customizing flexfields. All flexfields consist of segments which represent attributes of an entity. The value a user enters for an attribute is stored in a column of the entity table. Carefully plan flexfields before configuring them. Before configuring new segments for your flexfields, be sure to plan their implementation carefully.

If you have determined that a business object supports flexfields, and those flexfields have been registered, you can begin planning their configuration. Note the code name of the flexfield you intend to configure so that you can find it easily in the Define Flexfield activity. In some cases you can customize how the flexfield appears on the page. See Oracle Applications Cloud Help for specific products to determine any restrictions on using product-specific flexfields.

Configuring Flexfields

Administrators or implementors configure flexfields so they meet the needs of the enterprise. Some flexfields require configuration to make an application operate correctly. You can configure flexfields using the following methods:

- Go to the manage flexfield tasks in the Setup and Maintenance work area.
- Use the Highlight Flexfields command in the Administration menu while viewing a run time page.
 - Use the Configure Flexfield icon button to manage all aspects of a flexfield, such as change a segment's sequence number or configure a flexfield segment's business intelligence label.
 - Use the Add Segment and Edit Segment icon buttons to add and edit descriptive or extensible flexfield segments with simple configurations.
 - Use the Add Context icon button to add descriptive or extensible flexfield context values.

Configuring a flexfield includes the following:

- Defining value sets against which the values entered by users are validated
- Defining the structure or context of the segments in the flexfield
- Specifying the identifying information for each segment
- Specifying the display properties such as prompt, length and data type of each flexfield segment
- Specifying valid values for each segment, and the meaning of each value within the application
- ▼ Tip: You can create value sets while creating descriptive and extensible flexfield segments. However, define value sets before configuring key flexfield segments that use them, because you assign existing value sets while configuring key flexfield segments.

When creating table-validated, independent, dependent, or subset value sets while creating descriptive and extensible flexfield segments, you can optionally specify to display the description of the selected value to the right of the segment at run time. You can assign sequence order numbers to global segments and to context-sensitive segments in each context. Segment display is always in a fixed order based on the segments' sequence numbers. You cannot enter a number for one



segment that is already in use for a different segment. Therefore, you may consider numbering the segments in multiples, such as 4, 5, or 10, to make it easy to insert new attributes.

A flexfield column is assigned to a new segment automatically, but you can change the assignment before saving the segment. If you must set a specific column assignment for a segment, create that segment first to ensure that the intended column isn't automatically assigned to a different segment.

Enabling a Flexfield Segment for Business Intelligence

You can enable flexfield segments for business intelligence if the flexfield is registered in the database as an Oracle Business Intelligence-enabled flexfield. For more information about enabling segments for business intelligence, see points to consider when enabling descriptive, extensible, and key flexfield segments for business intelligence. For extensible flexfield segments, you can't assign labels to equalize segments across contexts that are semantically equivalent.

Deploying Flexfields

Once you have configured a flexfield, you must deploy it to make the latest definition available to run time users. In the Define Flexfields tasks, you can deploy a flexfield using either of the following commands:

- The Deploy Flexfield command deploys a flexfield to the mainline metadata. This command is for general use in a test or production environment.
- The Deploy to Sandbox command deploys a flexfield to sandbox. This command is for confirming that the flexfield is correctly configured before deploying it to the mainline metadata.

In Highlight Flexfields mode, when using the:

- Add Context, Add Segment, and Edit Segment tools for extensible flexfields, use the Save command to save
 your changes. Then use the Deploy command to deploy the flexfield to the mainline metadata
- Add Segment and Edit Segment tools for descriptive flexfields, use the Save and Deploy command to save your changes. Then deploy the flexfield to the mainline metadata

Once deployed, the deployment status indicates the state of the currently configured flexfield relative to the last deployed definition.

Optionally Changing a Flexfield Segment Appearance

The flexfield attributes that you define integrate with the user interface pages where users access the attributes' business object. Application development determines the UI pages where business objects appear and the display patterns used by default to render flexfield segments.

After a flexfield has been deployed to the mainline MDS repository so that it appears on application pages, you can customize it on a per-page basis using Page Composer. For example, you can hide a segment, change its prompt or other properties, or reorder the custom global attributes so that they are interspersed with the core attributes in the same parent layout. You can customize the appearance of descriptive and extensible flexfield segments in the UI page using Page Composer, once the flexfield is deployed to the mainline metadata.

If the applications are running in different locales, you can provide different translations for translatable text, such as prompts and descriptions. Enter translations using the locale that requires the translated text. In the global area, click your user name and from the **Settings and Actions** menu, select **Set Preferences**. Then change the text to the translated text for that locale.

Identifying Flexfields on a Run Time Page

The **Highlight Flexfields** command in the Administration menu of the Setup and Maintenance work area identifies the location of flexfields on the run time page by displaying an **Information** icon button for accessing details about each flexfield.



Even if a descriptive or extensible flexfield isn't yet deployed and no segments appear on the run time page in normal view, the flexfield appears in the Highlight Flexfield view for that page. For descriptive flexfields, the segments as of the last deployment appear. For extensible flexfields, any segments and contexts that have been saved but not yet deployed also appear as disabled.

Highlight Flexfields accesses the current flexfield metadata definition. Use the highlighted flexfield's **Configure Flexfield** icon button to manage flexfields directly. Alternatively, note a highlighted flexfield's name to search for it in the tasks for managing flexfields.

For more information about creating flexfields and adding them to a UI page, see the Oracle Fusion Applications Developer's Guide. For more information about customizing flexfield segment appearance with Page Composer, see guidance on customizing existing pages in the Oracle Fusion Applications Extensibility Guide.

Related Topics

- · Managing Descriptive Flexfields: Points to Consider
- Managing Extensible Flexfields: Points to Consider
- Managing Key Flexfields: Points to Consider

Flexfield Segment Properties: Explained

Independent of the value set assigned to a segment, segments may have properties that affect how they are displayed and how they function.

The following aspects are important in understanding

- Display properties
- Properties related to segment values
- Properties related to search
- Range validation segments
- Rule validation of segment values
- Naming conventions

Display Properties

The following table summarizes display properties.

Property	Description	
Enabled	Whether the segment can be used.	
Sequence	The order the segment appears in relation to the other configured segments.	
Prompt	The string to be used for the segment's label in the user interface.	
Display type	The type of field in which to display the segment.	
Selected and deselected values	If the display type is check box, the actual values to save. For example, Y and N or 0 and 1.	



Property	Description	
Display size	The character width of the field.	
Display height	The height of the field as measured in visible number of lines when the display type is a text area.	
Read only	Whether the field should display as read-only, not editable text.	
Description help text	The field-level description help text to display for the field. Use description help text to display a field-level description that expands on or clarifies the prompt provided for the field.	
	If description help text is specified, a Help icon button is displayed next to the field in the run time application. The description help text is displayed when the user hovers over the Help icon button.	
Instruction help text	The field-level instruction help text to display for the field.	
	Use instruction help text to provide directions on using the field. If instruction help text is specified, it's appears in an in-field help note window when users move the cursor over the field.	

Properties Related to Search

Extensible flexfield segments can be marked as selectively required in search using the indexed property. The indexed property requires users to enter a value before conducting a search on the attribute represented by the indexed segment. A database administrator must create an index on the segment column representing the indexed attribute.

Range Validation of Segments

Range validation enables you to enforce an arithmetic inequality between two segments of a flexfield. For example, a product must be ordered before it can be shipped. Therefore, the order date must be on or before the ship date. Also, the order date segment value must be less than or equal to the ship date segment value. You can use range validation to ensure this relationship.

The conditions for range validation are as follows:

- Segments must be configured for range validation in pairs, one with the low value and one with the high value.
- Both segments must be of the same data type.
- Both segments must be parts of the same structure in a key flexfield or parts of the same context in a descriptive flexfield or extensible flexfield.
- The low value segment must have a sequence number that is lesser than that of the high value segment.
- Non-range validated segments can exist between a range validated pair, but range validated pairs cannot overlap or be nested.

You can configure as many range validated pairs as you want within the same flexfield. Your application automatically detects and applies range validation to the segment pairs that you define, in sequence order. It must detect a low value segment first, and the next range validated segment that it detects must be a high value segment. These two segments are assumed to be a matching pair. The low value and the high value can be equal.

Rule Validation of Segment Values

Validation rules on descriptive and extensible flexfield segments determine how an attribute is validated. The value entered for an attribute on a business object may must match a specified format or be restricted to a list of values. Use a value set to specify the validation rules.



Value set validation is required for global segments and context-sensitive segments, and optional for context segments. In the case of context segments, the application may validate a value instead of the value set validating the value against the context segment. However the application entered values must match exactly the valid context segment values. If the context segment values are a superset or subset of the input values, you must assign a table-validated value set or independent value set to validate context values.

When you configure a descriptive flexfield segment, you can specify a constant to use for setting the initial value. The initial value can be an available parameter. For every planned segment, list the constant value or parameter, if any, to use for the initial value.

Naming Conventions

Enter a unique code, name, and description for the segment. These properties are for internal use and not displayed to end users. You can't change the code after the segment is created.

The Application Programming Interface (API) name is a name for the segment that isn't exposed to users. The API name is used to identify the segment in various integration points including web services, rules, and business intelligence. Use alphanumeric characters only with a leading character. For example, enter a code consisting of the characters A-Z, a-z, 0-9 with a non-numeric leading character. The use of spaces, underscores, multi-byte characters, and leading numeric characters isn't permitted. You can't change the API name after the segment has been created.

Related Topics

Managing Extensible Flexfields: Points to Consider

Flexfields Segments: How They Are Rendered

Flexfield segments appear on pages as attributes of business objects.

Settings That Affect Flexfield Segment Display

When you configure flexfield segments, the value you enter for the segment's display type determines how the segment appears at run time.

How Display Type Values Appear

The following figures represent how the display types render on the UI at run time. Each display type screenshot is assigned an alphabet that maps to the display type and its description in the table.

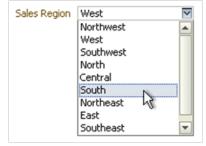


This figure contains the representation of a check box, a drop-down list, a list of values, and a search box.

A. Check Box



B. Drop-down List



C. List of Values

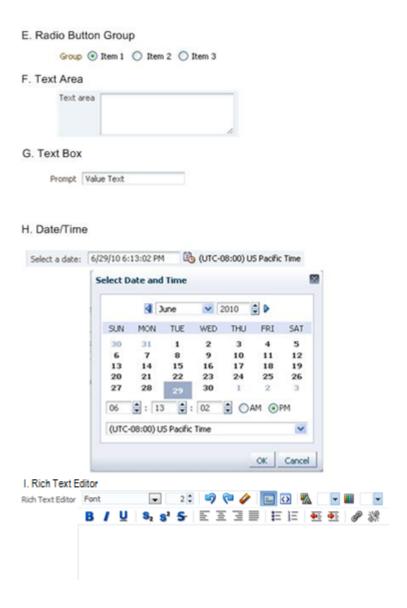


D. Pop-up List of Values



This figure contains the representation of a radio button group, text area, text box, date and time, and rich text editor.





This figure contains the representation of a color palette and a static URL field.



J. Color



K. Static URL



The following table describes each display type.

Display Type	Figure Reference	Description
Check Box	А	The field appears as a check box. If the user selects the check box, the checked value is used. Otherwise, the deselected value is used.
List	В	The field appears as a list of values available to the user for selection.
List of Values	С	The field appears as a list of values available to the user for selection. The user can also click Search to find more values.
Text Field with Search	D	The field appears as a text field with a Search icon button. The users can type a value in the text field or they can click the Search icon button to open another window for searching.



Display Type	Figure Reference	Description
Radio Button Group	E	The field appears as a set of radio buttons. The user can select one button. Selecting a button deselects any previously selected button in the set.
Text Area	F	The field appears as a text area in which the user can type multiple lines of text. The display width and height specify the visible width and number of lines in the text area, respectively.
Text Box	G	The field appears as a text field in which the user can type a single line of text. The display width controls the width of the text box.
Date Time	Н	The field enables the user to enter a date if the data type is Date, or a date and time if the data type is Date Time. The user can select the date in a calendar. If the data type is Date Time, the field also displays fields for specifying the hour, minutes, seconds, AM or PM, and time zone.
Rich Text Editor	I	The field appears as a text area in which the user can enter and edit multiple lines of formatted text. The display width and height specify the visible width and number of lines in the rich text editor, respectively.
		Note: This display type is available for extensible flexfields only.
Color	J	The field displays a color palette for the user to select a color at run time and assign it to the segment. During setup, this display type appears in the list for selection only if:
		 You are working on an extensible flexfield segment. The value set for the segment is set to ORA_FND_COLOR_#RRGGBB.
Static URL	К	The field appears as a text field in which users can enter a fixed URL that opens the web page when clicked.
		Note: The length of the URL must not exceed 255 characters.
Hidden		The field isn't displayed.



Flexfields and Value Sets: How They Work Together

Value sets are specific to your enterprise. When gathering information using flexfields, your enterprise's value sets validate the values that your users enter based on how you defined the value set.

You can assign a value set to any number of flexfield segments in the same or different flexfields. Value set usage information indicates which flexfields use the value set.

The following aspects are important in understanding how flexfields and value sets work together:

- Defining value sets
- Shared value sets
- Deployment

Defining Value Sets

As a key flexfield guideline, define value sets before configuring the flexfield, because you assign value sets to each segment as you configure a flexfield. With descriptive and extensible flexfields, you can define value sets when adding or editing a segment.

Note: Ensure that changes to a shared value set are compatible with all flexfield segments that use the value set.

Shared Value Sets

When you change a value in a shared value set, the change affects the value set for all flexfields that use that value set. The advantage of a shared value set is that a single change propagates to all usages. The drawback is that the change shared across usages may not be appropriate in every case.

Value Set Values

To configure custom attributes to be captured on the value set values screen in the Manage Value Sets task, configure the Value Set Values descriptive flexfield. The object's code is FND_VS_VALUES_B. This flexfield expects the context code to correspond to the value set code. For each value set, you can define a context whose code is the value set code, and whose context-sensitive segments are shown for the values of that value set. By default, the context segment is hidden since it maps to the value set code and is not expected to be changed.

You can also define global segments that are shown for all value sets. However, this would be quite unusual since it would mean that you want to capture that attribute for all values for all value sets.

Deployment

When you deploy a flexfield, the value sets assigned to the segments of the flexfield provide users with the valid values for the attributes represented by the segments.

Defaulting and Deriving Segment Values: Explained

To populate a flexfield segment with a default value when a row is created, specify a default type of constant or parameter and a default value.



To synchronize a segment's value with another field's value whenever it changes, specify the derivation value to be the flexfield parameter from which to derive the attribute's value. Whenever the parameter value changes, the attribute's value is changed to match. If you derive an attribute from a parameter, consider making the attribute read-only, as values entered by users are lost whenever the parameter value changes.

When defaulting or deriving a default value from a parameter, only those attributes designated by development as parameters are available to be chosen.

Different combinations of making the segments read only or editable in combination with the default or derivation value or both, have different effects.

Initial run time behavior corresponds to the row for the attribute value being created in the entity table. If the default value is read only, it cannot subsequently be changed through the user interface. If the default value isn't read only, users can modify it. However, if the segment value is a derived value, a user-modified segment value is overwritten when the derivation value changes.

Default Type	Default value specified?	Derivation value specified?	Initial run time behavior	Run time behavior after parameter changes
None	No	Yes	No initial segment value	The changed parameter derivation value updates segment value
Constant	Yes	No	Default segment value	N/A
Constant	Yes	Yes	Default segment value	The changed parameter derivation value updates segment value
Parameter	Yes	No	The default segment value is the parameter's default value	N/A
Parameter	Yes	Yes, and same as default value	The default segment value is the parameter's default and derivation value	The changed parameter derivation value updates segment value
Parameter	Yes	Yes, and different from default value	The default segment value is the parameter's default value	The changed parameter default value doesn't update segment value. Only the changed derivation value updates the segment value.



Flexfield Usages: Explained

The flexfield usage specifies the table with which the flexfield and its segments are associated.

A flexfield can have multiple usages. However, the first table registered for a flexfield indicates the master usage. Segments are based on the master usage. Other usages of the same table for the same flexfield use the same segment setup, though the column names may have a differentiating prefix.

On the Manage Descriptive Flexfields and Manage Extensible Flexfields pages, click the **Show Entity Usages** icon for a specific flexfield to view its entity usage. On the Manage Value Sets page, you can view the flexfield usages for a selected value set.

Extensible Flexfields

For extensible flexfield contexts, you can configure a different usage. The usage of an extensible flexfield context determines the scenarios or user interfaces in which the segments of a context appear to end users. For example, the Supplier page displays an extensible flexfield's supplier usage and the Buyer page for the same flexfield displays the buyer usage. Then, a context that is associated only with the supplier usage appears only on the Supplier page and not on the Buyer page.

Value Sets

The usage of value sets specifies the flexfields having segments where the identified value set is assigned.

FAQs for Flexfield Management

How can I access predefined flexfields?

Search for predefined flexfields using the Define Flexfields task list:

- 1. In the Setup and Maintenance work area, search for the **Define Flexfields** task list and expand it to view the tasks.
- 2. Open the task that corresponds to the flexfields you are searching for.
- 3. Enter any of the search parameters and click **Search**.
 - Tip: If you don't know the flexfield name or the code, use the **Module** field to filter search results.
- 4. Click a flexfield to view its details.

Why can't I edit my flexfield or value set configuration?

Your flexfield or value set configuration 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

Why did my page not display any flexfield?

For a flexfield to be available in the page, it must be registered by developers and also deployed. The segments appear on the page only after you have successfully deployed the flexfield.

A flexfield's deployment status indicates whether the flexfield segments are available to end users. The flexfield segments seen by end users in the run time correspond to the flexfield definition that was last deployed successfully.

For information about registering flexfields, see the Oracle Fusion Applications Developer's Guide. Some business objects haven't been designed to support flexfields. For information about how to enable business objects with flexfield capability, see Getting Started with Flexfields in the Oracle Fusion Applications Developer's Guide.

Note: Oracle Sales Cloud doesn't support flexfields.

To add custom attributes to these applications, you may use Application Composer. For more information, see the product-specific documentation.

Why did my flexfield changes not appear in the run time UI?

The ADF business components or artifacts of a flexfield, which are generated into an Oracle Metadata Services (MDS) Repository when the flexfield is deployed, are cached within a user session. You must sign out and sign back in again to view flexfield definition changes reflected in the run time application user interface page.

How can I enable flexfield segments for Oracle Social Network Cloud Service?

When you manage Oracle Social Network Objects during setup and maintenance, search for the business object that includes descriptive flexfields. Select the attributes that are defined as flexfield segments and enable them.

Flexfield Deployment

Flexfield Deployment: Explained

Deployment generates or refreshes the Application Development Framework (ADF) business component objects that render the flexfield in a user interface. The deployment process adds custom attributes to the Web Services Description Language (WSDL) schemas exposed by Oracle ADF services and used by SOA composites. Flexfields are deployed for the first time during the application provisioning process. After you configure or change a flexfield, you must deploy it to make the latest definition available to users.



If a descriptive flexfield is enabled for business intelligence, the deployment process redeploys the flexfield's business intelligence artifacts.

You can deploy a flexfield to a sandbox for testing or to the mainline metadata for use in a test or production run time environment. You can deploy extensible flexfields as a background process.

After deployment, the custom attributes are available for incorporating into the SOA infrastructure, such as business process and business rule integration. For example, you can now write business rules that depend on the custom attributes. You must sign out and sign back in to Oracle Applications Cloud to see the changes you deployed in the run time.

The following aspects are important in understanding flexfield deployment:

- Deployment Status
- Initial Deployment Status
- Metadata Validations
- Metadata Synchronization
- Deployment as a Background Process
- Export of Artifacts from Flexfield MDS

Deployment Status

Every flexfield has a deployment status.

A flexfield can have the following deployment statuses:

Deployment Status	Meaning
Edited	The flexfield metadata definition hasn't been deployed yet. Updates of the metadata definition aren't applied in the run time environment yet.
Patched	The flexfield metadata definition has been modified through a patch or a data migration action, but the flexfield hasn't yet been deployed. So, the updated definition isn't reflected in the run time environment.
Deployed to Sandbox	The current metadata for the flexfield is deployed in ADF artifacts and available as a flexfield-enabled sandbox. The status of the sandbox is managed by the Manage Sandboxes task available to the Administrator menu of the Setup and Maintenance work area.
Deployed	The current metadata for the flexfield is deployed in ADF artifacts and available to users. No changes have been made to the flexfield after being deployed to the mainline metadata.
Error	The deployment attempt in the mainline metadata failed.

Note: Whenever a value set definition changes, the deployment status of a flexfield that uses that value set changes to edited. If the change results from a patch, the deployment status of the flexfield changes to patched.

Initial Deployment Status of Flexfields

The Oracle Applications Cloud implementation loads flexfield metadata into the database. This initial load sets the flexfield status to Edited. During installation, the application provisioning process deploys the flexfields of the provisioned applications, setting their status to Deployed if no errors occur.



In a provisioned application, deployed flexfields are ready to use. In some cases, flexfield availability at run time requires setup, such as defining key flexfields.

Metadata Validation

Use the Validate Metadata command to view possible metadata errors before attempting to deploy the flexfield. Metadata validation is the initial phase of all flexfield deployment commands. By successfully validating metadata before running the deployment commands, you can avoid failures in the metadata validation phase of a deployment attempt. The deployment process ends if an error occurs during the metadata validation phase. Metadata validation results don't affect the deployment status of a flexfield.

Metadata Synchronization

When an extensible or descriptive flexfield is deployed, the deployment process regenerates the XML schema definition (XSD). As a result, the custom attributes are available to web services and the SOA infrastructure.

After deploying a flexfield configuration, you must synchronize the updated XML schema definition (XSD) files in the MDS repositories for each SOA application.

Note: To synchronize the updated XSD files in the MDS repositories in Oracle Cloud implementations, log a service request using My Oracle Support at http://support.com/

Deployment as a Background Process

You can deploy extensible flexfields offline as a background process and continue working in the session without having to wait for the deployment to complete. You can queue up several extensible flexfields and deploy as a background process. The flexfields are deployed, one at a time, in the order that you deploy them to the queue. You must deploy extensible flexfields with more than 30 categories as a background process.

You can remove an extensible flexfield from the deployment queue with the Cancel Background Deployment command. When an extensible flexfield is deployed in a background process, its offline status indicates that the flexfield is in a background deployment process. A flexfield's offline status is cleared and its deployment status updated when the background deployment process has completed.

Export of Artifacts from Flexfield MDS

You can export business components from MDS for descriptive, extensible, or key flexfields, mainly for use in troubleshooting issues with flexfields. Use **Download Flexfield Archive** on the Manage Flexfields page to export MDS artifacts of the selected flexfield, and import them to an archive on your local computer. You can use these archived business components of flexfields for troubleshooting purposes.

Alternatively, export the deployed artifacts using exportMetadata WLST.

Flexfield Deployment Status: How It Is Calculated

Flexfield deployment status indicates how the flexfield metadata definition in the Oracle Fusion Applications database relates to the Application Development Framework (ADF) business components generated into an Oracle Metadata Services (MDS) Repository.

The following aspects are important in understanding how flexfield deployment status is calculated:

- Settings that affect flexfield deployment status
- How deployment status is calculated



Settings That Affect Flexfield Deployment Status

If you have made a change to a flexfield and expect a changed deployment status, be sure you have saved your changes. No settings affect flexfield deployment status.

How Deployment Status Is Calculated

If the flexfield definition has been edited through the Define Flexfields activity task flows, the status is Edited. The latest flexfield metadata definition in the Oracle Fusion application diverges from the latest deployed flexfield definition. Any change, including if a value set used in a flexfield changes, changes the deployment status to Edited. If a flexfield has never been deployed, its status is Edited.

Note: When an application is provisioned, the provisioning framework attempts to deploy all flexfields in that application.

If you deploy the flexfield to a sandbox successfully, the status is Deployed to Sandbox. The latest flexfield metadata definition in the Oracle Fusion application matches the metadata definition that generated ADF business components in a sandbox MDS Repository. Whether the sandbox is active or not doesn't affect the deployment status. If the flexfield was deployed to a sandbox and hasn't been edited or redeployed to the mainline metadata since then, the status remains Deployed to Sandbox independent of whether the sandbox is active, or who is viewing the status.

If you deploy the flexfield successfully to the mainline metadata, the status is Deployed. The latest flexfield metadata definition in the Oracle Fusion application matches the metadata definition that generated ADF business components in a mainline MDS Repository. Change notifications are sent when a flexfield is deployed successfully to the mainline metadata.

If either type of deployment fails so that the current flexfield definition isn't deployed, the status is Error. The deployment error message gives details about the error. The latest flexfield metadata definition in the Oracle Fusion application likely diverges from the latest successfully deployed flexfield definition.

If the flexfield definition has been modified by a patch, the status is Patched. The latest flexfield metadata definition in the Oracle Fusion application diverges from the latest deployed flexfield definition. If the flexfield definition was Deployed before the patch and then a patch was applied, the status changes to Patched. If the flexfield definition was Edited before the patch and then a patch was applied, the status will remain at Edited to reflect that there are still changes (outside of the patch) that aren't yet in effect.

When a deployment attempt fails, you can access the Deployment Error Message for details.

Related Topics

Managing Extensible Flexfields: Points to Consider

Deploying a Flexfield-Enabled Sandbox: How It Works With Mainline Metadata

The flexfield definition in a sandbox corresponds to the flexfield metadata definition in the Oracle Fusion Applications database at the time the flexfield was deployed to the sandbox. When the flexfield is ready for end users, the flexfield must be deployed to the mainline metadata.

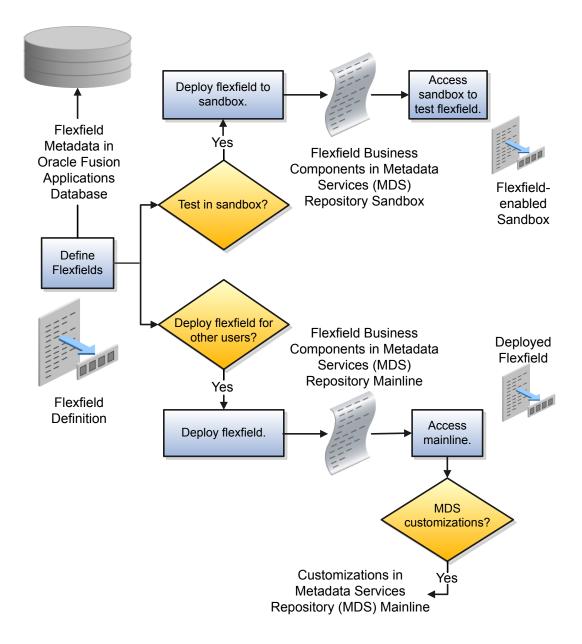
A flexfield-enabled sandbox uses the following components.

Flexfield metadata in the Oracle Applications Cloud database



- Flexfield business components in a sandbox Oracle Metadata Services (MDS) repository
- User interface customizations for the flexfield in the mainline MDS repository

The figure shows the two types of deployment available in the Manage Flexfield tasks of the Define Flexfields activity. Deploying a flexfield to a sandbox creates a sandbox MDS Repository for the sole purpose of testing flexfield behavior. The sandbox is only accessible to the administrator who activates and accesses it, not to users generally. Deploying a flexfield to the mainline metadata applies the flexfield definition to the mainline MDS Repository where it is available to end users. After deploying the flexfield to the mainline metadata, customize the page where the flexfield segments appear. Customization of the page in the sandbox MDS Repository cannot be published to the mainline MDS Repository.





Sandbox Metadata Services Repository Data

Deploying the flexfield to a sandbox generates the Application Development Framework (ADF) business components of a flexfield in a sandbox MDS Repository for testing in isolation.

Caution: Don't customize flexfield segment display properties using Page Composer in a flexfield-enabled sandbox as these changes will be lost when deploying the flexfield to the mainline metadata.

Mainline Metadata Services Repository Data

The Oracle Fusion Applications database stores the single source of truth about a flexfield. When the flexfield is deployed, the ADF business component objects that implement the flexfield in the run time user interface are generated in the mainline MDS Repository from this source.

Related Topics

Managing Customizations Using Sandboxes: Explained

Deploying a Flexfield to a Sandbox: Points to Consider

Deploying a flexfield to a sandbox creates a flexfield-enabled sandbox. Each flexfield-enabled sandbox contains only one flexfield.

You can test the run time behavior of a flexfield in the flexfield-enabled sandbox. If changes are needed, you return to the Define Flexfield tasks to change the flexfield definition.

When you deploy a flexfield to sandbox, the process reads the metadata about the segments from the database, generates flexfield Application Development Framework (ADF) business component artifacts based on that definition, and stores in the sandbox only the generated artifacts derived from the definition.

When you deploy a flexfield sandbox, the process generates the name of the flexfield sandbox, and that flexfield sandbox is set as your current active sandbox. When you next sign in to the application, you can see the updated flexfield configurations. The Oracle Fusion Applications global area displays your current session sandbox.

Note: Unlike a standalone sandbox created using the Manage Sandboxes tool, the sandbox deployed for a flexfield contains only the single flexfield. You can manage flexfield sandboxes, such as setting an existing flexfield sandbox as active or deleting it, using the Manage Sandboxes tool.

When you deploy a flexfield to the mainline metadata after having deployed it to the sandbox, the sandbox-enabled flexfield is automatically deleted.

Sandbox MDS Repository Data

The sandbox data lets you test the flexfield in isolation without first deploying it in the mainline metadata where it could be accessed by users.



Caution: Don't customize flexfield segment display properties using Page Composer in a flexfield-enabled sandbox as these changes will be lost when deploying the flexfield to the mainline metadata.



Managing a Flexfield-Enabled Sandbox

When you deploy a flexfield as a sandbox, that flexfield-enabled sandbox automatically gets activated in your user session. When you sign back in to see the changes, the sandbox is active in your session.

You can only deploy a flexfield to a sandbox using the Define Flexfields task flow pages.

You also can use the Manage Sandboxes feature in the Administration menu of the Setup and Maintenance work area to activate and access a flexfield-enabled sandbox.

Note: Whether you use the Define Flexfields or Manage Sandboxes task flows to access a flexfield-enabled sandbox, you must sign out and sign back in before you can see the changes you deployed in the run time.

You cannot publish the flexfield from the sandbox to the mainline metadata. You must use the Define Flexfields task flow pages to deploy the flexfield for access by users of the mainline metadata because the flexfield configuration in the mainline metadata is the single source of truth.

Related Topics

Managing Customizations Using Sandboxes: Explained

Deploying Flexfields Using the Command Line: Explained

You can use the Manage Key Flexfields, Manage Descriptive Flexfields, and Manage Extensible Flexfields tasks to deploy flexfields. You can also use WebLogic Server Tool (WLST) commands for priming the Oracle Metadata Services (MDS) Repository with predefined flexfield artifacts and for deploying flexfields.

The table describes the available commands.

WebLogic Server Tool Command	Description
deployFlexForApp	Deploys all flexfields for the specified enterprise application. Only flexfields whose status is other than deployed are affected by this command, unless the option is enabled to force all flexfields to be deployed, regardless of deployment status. Initial application provisioning runs this command to prime the MDS Repository with flexfield artifacts.
deployFlex	Deploy a single flexfield regardless of deployment status
deployPatchedFlex	Deploys flexfield changes that have been delivered using a flexfield Seed Data Framework (SDF) patch. Deploys flexfields that have a Patched deployment status.
deleteFlexPatchingLabels	Displays MDS label of flexfield changes for viewing and deleting patching labels.
validateFlexDeploymentStatus	Displays list containing flexfields that aren't deployed or failed deployment.



Executing these commands outputs a report at the command line. The report provides the following information for every flexfield that is processed.

- Application identity (APPID)
- Flexfield code
- Deployment result, such as success or error

In case of errors, the report lists the usages for which errors occurred. If a run time exception occurs, the output displays the trace back information. For each WLST flexfield command, adding the reportFormat='xml' argument returns the report as an XML string.

Consider the following aspects of command-line deployment.

- Preparing to use the WLST flexfield commands
- Using the deployFlexForApp command
- Using the deployFlex command
- Using the deployPatchedFlex COmmand
- Using the deleteFlexPatchingLabels command
- Using the validateFlexDeploymentStatus command
- Closing WLST and checking the results

Preparing To Use the WLST Flexfield Commands

You can only execute the WLST flexfield commands on a WebLogic Administration Server for a domain that has a running instance of Oracle Fusion Middleware Extensions for Oracle Application.

For more information about deploying the Oracle Fusion Middleware Extensions for Oracle Application to the server domains, see the Oracle Fusion Applications Developer's Guide.

Ensure that the AppMasterDB data source is registered as a JDBC data source with the WebLogic Administration Server and points to the same database as the ApplicationDB data source.

Start the WebLogic Server Tool (WLST) if not currently running.

UNIX:

sh \$JDEV_HOME/oracle_common/common/bin/wlst.sh

Windows:

wlst.cmd

Connect to the server, replacing the user name and password arguments with your WebLogic Server user name and password.

```
connect('wls username', 'wls password', 'wls uri')
```

The values must be wrapped in single-quotes. The wls_uri value is typically T3://localhost:7101.

For more information about the WLST scripting tool, see the Oracle Fusion Middleware Oracle WebLogic Scripting Tool.

Using the deployFlexForApp Command

The deployFlexForApp command translates the product application's predefined flexfield metadata into artifacts in the MDS Repository.



Note: This command is run automatically when you provision applications. However, if you customize applications, you have to manually run it following the order of tasks as given here:

- 1. Configure your application to read the flexfield artifacts from the MDS Repository.
- 2. Run the deployFlexForApp command.
- 3. Sign in to the application.

This sequence of steps is required even if there is no predefined flexfield metadata.

This command doesn't deploy flexfields that have a status of Deployed unless the force parameter is set to 'true' (the default setting is 'false').

For more information about priming the MDS partition with configured flexfield artifacts, see the Oracle Fusion Applications Developer's Guide.

From the WLST tool, execute the following commands to deploy the artifacts to the MDS partition, replacing product application shortname with the application's short name wrapped in single-quotes.

```
deployFlexForApp('product_application_shortname'[, 'enterprise_id'] [,'force'])
```

In a multi-tenant environment, replace enterprise id with the Enterprise ID to which the flexfield is mapped. Otherwise, replace with 'None' or don't provide a second argument.

To deploy all flexfields regardless of their deployment status, set force to 'true' (the default setting is 'false'). To deploy all flexfields in a single-tenant environment, you either can set enterprise id to 'None', or you can use the following signature:

```
deployFlexForApp(applicationShortName='product application shortname',force='true')
```

The application's short name is the same as the application's module name. For more information about working with application taxonomy, see the Oracle Fusion Applications Developer's Guide.

Using the deployFlex Command

From the WLST tool, execute the following command to deploy a flexfield, replacing flex code with the code that identifies the flexfield, and replacing flex type with the flexfield's type, either descriptive flexfield, key flexfield, or extensible flexfield. The values must be wrapped in single-quotes.

```
deployFlex('flex code', 'flex type')
```

Optionally, execute the following command if the flexfield is an extensible flexfield, and you want to deploy all the flexfield's configurations.

Note: By default, extensible flexfields are partially deployed. That is, only the pages, contexts, or categories that had recent changes, are deployed.

```
deployFlex('flex_code', 'flex_type', ['force_Complete_EFF_Deployment'])
where, forceCompleteEFFDeployment=None
```

Using the deployPatchedFlex Command

Use the deployPatchedFlex command for situations where the patching framework doesn't initiate the command, such as when an application has been patched offline.

If the installation is multi-tenant enabled, the command deploys all patched flexfields for all enterprises. This command isn't intended to be initiated manually.

Check with your provisioning or patching team, or the task flows for managing flexfields, to verify that the flexfield has a Patched deployment status.



From the WLST tool, execute the following command to deploy the artifacts to the MDS partition.

deployPatchedFlex()

Execute the following command to deploy all flexfields that have either a READY status or an ERROR status.

deployPatchedFlex (mode='RETRY')

Using the deleteFlexPatchingLabels Command

Whenever you deploy flexfield changes to MDS using the deployPatchedFlex() WLST command, an MDS label is created in the format FlexPatchingWatermarkdate+time. Use the deleteFlexPatchingLabels command to inquire about and delete these labels.

From the WLST tool, execute the deleteFlexFatchingLabels () command with no arguments to delete the flexfield patching labels.

To output a list of flexfield patching labels, execute the command with the infoonly argument, as follows:

deleteFlexPatchingLabels(infoOnly='true')

Using the validateFlexDeploymentStatus Command

The validateFlexDeploymentStatus() WLST command checks the deployment status of all flexfields in an Oracle Fusion Applications deployment.

validateFlexDeploymentStatus()

Use this command to verify that all flexfields in the current instance of provisioned Java EE applications are deployed.

Closing WLST and Checking the Results

To close the tool, execute the command: disconnect().

Optionally, sign in the application, open user interface pages that contain flexfields, and confirm the presence of flexfields for which configuration exists, such as value sets, segments, context, or structures.

Manage 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.

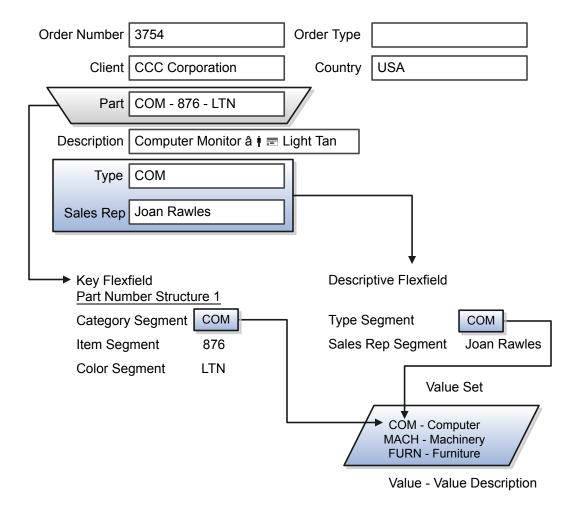
Precision and Scale

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

- · Chart of Accounts: How Its Components Fit Together
- What's the difference between a lookup type and a value set?

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

What's the difference between a lookup type and a value set?

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)



Column Name	Data Type
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	Туре
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 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.





19 Flexfields Maintenance

Manage Descriptive Flexfields

Descriptive Flexfields: Explained

Use descriptive flexfields to add custom attributes to business object entities, and define validation for them.

All the business object entities that you can use in the application are enabled for descriptive flexfields. However, configuring descriptive flexfields is an optional task.

Context

A descriptive flexfield can have only one context segment to provide context sensitivity. The same underlying database column can be used by different segments in different contexts.

For example, you can define a Dimensions context that uses the following attributes:

- ATTRIBUTE1 column for height
- ATTRIBUTE2 column for width
- ATTRIBUTE3 column for depth

You can also define a Measurements context that uses the same columns for other attributes:

- ATTRIBUTE1 column for weight
- ATTRIBUTE2 column for volume
- ATTRIBUTE3 column for density

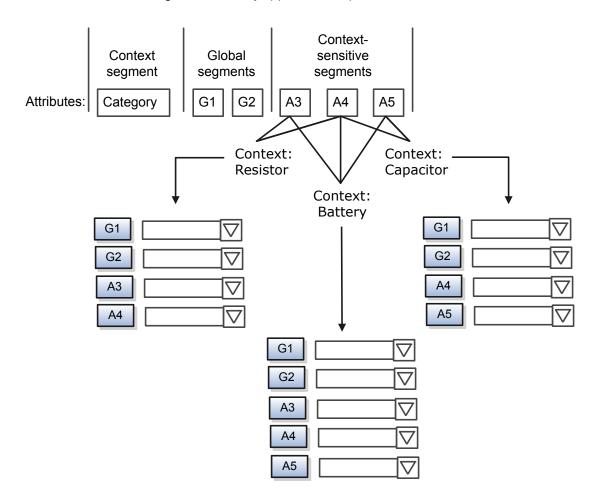
Segments and Contexts

Descriptive flexfield segments are of the following types:

Segment Type	Run Time Appearance
Global segment	Always available
Context segment	Determines which context-sensitive segments are displayed
Context-sensitive segment	Displayed depending on the value of the context segment



In the figure, a descriptive flexfield has one context segment called Category for which there are three values: Resistor, Battery, and Capacitor. Additionally, the descriptive flexfield comprises two global segments that appear in each context, and three context-sensitive segments that only appear in the specific context.



Application development determines the number of segments available for configuring. During implementation, configure the flexfield by determining the following:

- Attributes to add using the available segments
- Context values
- The combination of attributes in each context

Value Sets

For each global and context-sensitive segment, you configure the values permitted for the segment. Based on it, the values that end users enter are validated, including interdependent validation among the segments.

Protected Descriptive Flexfield Data

Application developers may mark some data configurations in a descriptive flexfield as protected, indicating that you can't edit them.



Related Topics

Value Sets: Explained

· Managing Flexfields: Points to Consider

How can I access predefined flexfields?

Planning Descriptive Flexfields: Points to Consider

Once you have identified a flexfield to configure, plan the configuration in advance. Compile a list of the UI pages and other artifacts in your deployment that are affected by the configuration. Verify that you are provisioned with the roles needed to view and configure the flexfield. View the flexfield using the Highlight Flexfields command in the Administration menu while viewing the run time page where the flexfield appears. Plan how you will deploy the flexfield for test and production users. Review the tools and tasks available for managing flexfields, such as the Define Flexfields task list, Manage Sandboxes, and Highlight Flexfields for adding and editing flexfield segments.

Planning a descriptive flexfield can involve the following tasks:

- 1. Identify existing parameters.
- 2. Identify existing context values and whether the context value is derived.
- 3. Identify custom attributes and plan the descriptive flexfield segments, segment properties, and structure.
- 4. Plan validation rules.
- 5. Plan initial values.
- 6. Plan attribute mapping to Oracle Business Intelligence objects.

Identify Existing Descriptive Flexfield Parameters

Some descriptive flexfields provide parameters that can be used to specify the initial value of a descriptive flexfield segment. The parameter is external reference data, such as a column value or a session variable. For example, if a flexfield has a user email parameter, you can configure the initial value for a customer email attribute to be derived from that parameter.

Review the list of available parameters in the **Derivation Value** field in the Create Segment page for a descriptive flexfield. If you decide to use one of the parameters to set an initial value, select that parameter from the **Derivation Value** drop-down list when you add the descriptive flexfield segment.

Evaluate Whether the Context Value Is Derived

The context value for a descriptive flexfield might have been preconfigured to be derived from an external reference. For example, if the context is Marriage Status, then the value might be derived from an attribute in the employee business object. When the context value is derived, you might need to take the derived values and their source into consideration in your plan.

To determine whether the context value is derived, access the Edit Descriptive Flexfield task to view the list of configured context values for the flexfield. The Derivation Value field in the Context Segment region displays a list of available parameters. If context values have been preconfigured, see Oracle Applications Cloud Help for product-specific information about the use of those values.

Plan the Segments, Segment Properties, and Structure

Identify the custom attributes you need for a business object to determine the segments of the descriptive flexfield. Determine the segment properties such as the prompt, display type, or initial value.

The structure of the descriptive flexfield is determined by its global, context, and context-sensitive segments. Plan a global segment that captures an attribute for every instance of the business object. Plan a context for segments that depend on



a condition of situation applying to a particular instance of the business object. Plan context-sensitive segments to capture attributes that are relevant in the context.

There is only one context segment available for descriptive flexfields. If you have more than one group of custom attributes where you could use the context segment, you will have to pick one group over the others, based on your company's needs and priorities, and add the other custom attributes as global segments.

Plan Validation Rules

Define each segment's validation rules and check if value sets exist for those rules or you must create new ones. If you must create a value set, you can create it either before configuring the flexfield or while creating or editing a segment.

When determining a segment's validation rules, consider the following questions:

- What is the data type character, date, date and time, or number?
- Does the segment require any validation beyond data type and maximum length?
- Should a character type value be restricted to digits, or are alphabetic characters allowed?
- Should alphabetic characters automatically be changed to uppercase?
- Should numeric values be zero-filled?
- How many digits can follow the radix separator of a numeric value? In base ten numerical systems the radix separator is decimal point.
- Does the value need to fall within a range?
- Should the value be selected from a list of valid values? If so, consider the following questions:
 - o Can you use an existing application table from which to obtain the list of valid values, or do you need to create a custom list?
 - If you are using an existing table, do you need to limit the list of values using a WHERE clause?
 - Does the list of valid values depend on the value in another flexfield segment?
 - Is the list of valid values a subset of another flexfield segment's list of values?

Plan Initial Values

For every segment, list the constant value or SQL statement, if any, to use for the initial value of the custom attribute.

Plan How Segments Map to Oracle Business Intelligence Objects

You can extend descriptive flexfields into Oracle Transactional Business Intelligence (OTBI) for ad hoc reporting purposes. Determine the descriptive flexfield segments to be made available for reporting, and select the **BI Enabled** check box accordingly on the Manage Descriptive Flexfields page. You must run a process to extend the BI enabled segments into OTBI. For more information about extending the BI enabled segments into OTBI, see the Setup and Configuration chapter in the Oracle Transactional Business Intelligence Administrator's Guide.

Depending on the reporting needs, you may map similar context-sensitive attributes from different contexts to the same attribute in OTBI. For example, there may be a segment tracking the Product Color attribute in different contexts of a context sensitive descriptive flexfield. You can use segment labels to map these context-sensitive attributes together by defining a segment label and updating the BI Label list accordingly.

Related Topics

• Flexfield Segment Properties: Explained

Value Sets: Explained

Defaulting and Deriving Segment Values: Explained



Managing Descriptive Flexfields: Points to Consider

Configuring descriptive flexfields involves managing the available flexfields registered with your Oracle Applications Cloud database and configuring their flexfield-level properties, defining and managing descriptive flexfield contexts, and configuring global and context-sensitive segments.

Every descriptive flexfield is registered to include a context segment, which you may choose to use or not.

In general, configuring descriptive flexfields involves:

- 1. Creating segment labels for business intelligence enabled flexfields.
- 2. Configuring global segments by providing identity information, the initial default value, and the display properties.
- 3. Configuring the context segment by specifying the prompt, whether the context segment should be displayed, and whether a value is required.
- **4.** Configuring contexts by specifying a context code, description, and name for each context value, and adding its context-sensitive segments, each of which is configured to include identifying information, the column assignment, the initial default value, and the display properties.

The following aspects are important in understanding descriptive flexfield management:

- Segments
- Adding segments to highlighted descriptive flexfields
- Usages
- Parameters
- Delimiters
- Initial Values
- Business Intelligence

Segments

You can assign sequence order numbers to global segments and to context-sensitive segments in each context. Segment display is always in a fixed order. You cannot enter a number for one segment that is already in use for a different segment.

Value sets are optional for context segments and follow specific guidelines:

- The value set that you specify for a context segment consists of a set of context codes.
- Each context code corresponds to a context that is appropriate for the descriptive flexfield.
- The value set must be independent or table-validated.
- If table-validated, the WHERE clause must not use the VALUESET.value_set_code or SEGMENT.segment_code bind variables.
- The value set must be of data type Character with the maximum length of values being stored no larger than the context's column length.
- If you don't specify a value set for a context segment, the valid values for that context segment are derived from the
 context codes. The definition of each context segment specifies the set of context-sensitive segments that can be
 presented when that context code is selected by the end user.
- For reasons of data integrity, you cannot delete an existing context. Instead, you can disable the associated context value in its own value set by setting its end date to a date in the past.
- You can configure the individual global segments and context-sensitive segments in a descriptive flexfield. These
 segment types are differentiated by their usage, but they are configured on application pages that use most of the
 same properties.



Adding Segments to Highlighted Descriptive Flexfields

When you highlight flexfields on a run time page and use an **Add Segment** icon button to create a segment, the segment code, name, description, table column, and sequence number are set automatically. If you use an **Add Segment** icon button to configure descriptive flexfield segments, you cannot use an existing value set. Value sets are created automatically when you add the segments. You can enter the valid values, their descriptions, and the default value or specify the formatting constraints for the value set, such as minimum and maximum values.

Depending on display type, the value set you create with the **Add Segment** icon button is either an independent value set or a format-only value set. The table shows which type of value set is created depending on the segment display component you select.

Display Component	Value Set Created with Add Segment
Check Box	Independent
Drop-down List	Independent
List of Values	Independent
Radio Button Group	Independent
Text Field With Search	Independent
Text box	Format Only
Text area	Format Only
Date/Time	Format Only

Tip: After you add a context value, refresh the page to see the new value.

Usages

Descriptive flexfield usages allow for the same definition to be applied to multiple entities or application tables, such as a USER table and a USER_HISTORY table. Descriptive flexfield tables define the placeholder entity where the flexfield segment values are stored once you have configured the descriptive flexfield. When you configure a flexfield, the configuration applies to all its usages.

Parameters

Some descriptive flexfields provide parameters, which are attributes of the same or related entity objects. Parameters are public arguments to a descriptive flexfield. Parameters provide outside values in descriptive flexfield validation. You use parameters to set the initial value or derivation value of an attribute from external reference data, such as a column value or a session variable, rather than from user input. Parameters can be referenced by the logic that derives the default segment value, and by table-validated value set WHERE clauses.



Delimiters

A segment delimiter or separator visually separates segment values when the flexfield is displayed as a string of concatenated segments.

Initial Values

The SQL statement defining an initial value must be a valid statement that returns only one row and a value of the correct type.

You can use two types of SQL statements:

- SQL statement with no binding. For example, select MIN(SALARY) from EMPLOYEES.
- SQL statement with bind variables. You can use the following bind variables in the WHERE clause of the SQL statement.
 - : { SEGMENT . < segment code > }: Identifies a segment in the same context.
 - : {context_code>; segment_code>}: Identifies a segment in a different context. The context must be in the same category or in an ancestor category, and it cannot be a multiple-row context.
 - : {VALUESET. < value_set_code > }: Identifies the closest prior segment in the same context that is assigned to the specified value set.
 - : {FLEXFIELD. < internal_code>}: Identifies a flexfield.

For more information about using bind variables, see the help for value sets.

Business Intelligence

Selecting a global, context, or context-sensitive segment's BI Enabled check box specifies that the segment is available for use in Oracle Business Intelligence.

When the flexfield is imported into Oracle Business Intelligence, the label you selected from the BI Label drop-down list equalizes the segment with segments in other contexts, and maps the segment to the logical object represented by the label.

Related Topics

- Defining Value Sets: Critical Choices
- Defaulting and Deriving Segment Values: Explained
- Flexfield Segment Properties: Explained
- Why can't I edit my flexfield or value set configuration?

Enabling Descriptive Flexfield Segments for Business Intelligence: Points to Consider

A descriptive flexfield that is registered in the database as enabled for Oracle Business Intelligence (BI) includes a BI Enabled setting for each of its segments. When a global, context, or context-sensitive segment is BI-enabled, it is available for use in Oracle Business Intelligence.

The following aspects are important in understanding BI-enabled flexfield segments:

• Flattening business components to use BI-enabled segments in Oracle BI



- Equalizing segments to prevent duplication and complexity in the flattened component
- Mapping attributes of flattened business components to logical objects in Oracle BI
- Managing the labels that map segments to logical objects in Oracle BI

After you deploy a business intelligence-enabled flexfield, use the Import Oracle Fusion Data Extensions for Transactional Business Intelligence process to import the flexfield changes into the Oracle Business Intelligence repository. Users can make use of the newly-generated attributes in business intelligence applications. For example, a user can generate a report that includes attributes added by the descriptive flexfield. For additional information about logical objects and import, refer to the Oracle Transactional Business Intelligence Administrator's Guide.

Flattening

When you deploy a business intelligence-enabled descriptive flexfield, the deployment process generates an additional set of flattened Application Development Framework (ADF) business components in addition to the usual ADF business components and ADF faces run time artifacts that are generated during deployment. The flattened business components include attributes for business intelligence-enabled segments only. Flattening means each custom column in each context shows up as an attribute in an Oracle Business Intelligence folder.

Flattened components include one attribute for the BI-enabled context-segment, and one attribute for each business intelligence-enabled global segment. For BI-enabled context-sensitive segments, consider the following:

- If you assigned a label to the segment, the flattened components include an additional single attribute representing segments with that label.
- If you didn't assign a label, the flattened components include a discrete attribute for each BI-enabled contextsensitive segment in each context.

Mapping to Logical Objects in Business Intelligence

You can simplify reporting by representing similar segments as a single logical object in Business Intelligence.

If you assign a label to any set of context-sensitive segments that serve the same purpose in different contexts, you can consolidate or equalize the segments into a single attribute. This prevents duplication and the extra workload and complexity that result from the flattening process. For example, a United States context might have a Passport segment and a Canada context might have Visa segment. If you assign the NationalID segment label to both the Passport and Visa segments, they are equalized into the same NationalID attribute in the flattened business component.

Non-labeled context-sensitive segments aren't equalized across context values, so the flattened components include a separate attribute for each context-sensitive segment for each context value. It may not be possible to equalize similarly labeled segments if they have incompatible data types or value set types.

Assign a label to a global segment, context segment, or context-sensitive segment to map the corresponding attribute in the flattened components to a logical object in Oracle Business Intelligence. Using labels to map segments to BI logical objects minimizes the steps for importing the flexfield into Oracle Business Intelligence.

Note: Assigning a label to a context-sensitive segment serves to equalize the attribute across contexts, as well as map the equalized attribute to business intelligence.

Managing Labels

You may assign a predefined label (if available) to segments or create new labels for assignment, as needed. Specify a code, name, and description to identify each label. In the BI Object Name field, enter the name of the logical object in Oracle Business Intelligence to which the segment label should map during import. Specifying the BI logical object minimizes the



steps for importing the flexfield into Oracle Business Intelligence and helps to equalize context-sensitive segments across contexts.

If no labels are assigned to a BI-enabled segment, or the BI Object Name on the assigned label doesn't exist in business intelligence, you must manually map the segment to the desired logical object when importing into Oracle Business Intelligence.

In addition, context-sensitive segments without labels cannot be equalized across context values. The flattened components include a separate attribute for each non-labeled context-sensitive segment in each context.

Importing to Oracle Business Intelligence Repository

After you deploy a business intelligence-enabled flexfield, import the flexfield changes into the Oracle Business Intelligence repository to make use of the newly flattened business components in business intelligence and then propagate the flexfield object changes. When you import the metadata into the Oracle Business Intelligence repository, you must do so as the FUSION_APPS_BI_APPID user.

To import flexfield changes into the Oracle Business Intelligence repository in Oracle Cloud implementations, run the Import Oracle Fusion Data Extensions for Transactional Business Intelligence process. For additional information about import, refer to the Oracle Transactional Business Intelligence Administrator's Guide.

Note: When you import a flexfield into the Oracle Business Intelligence repository, you see both <name>_ and <name>_ attributes for each segment, along with some other optional attributes. The <name> attribute contains the value. The <name>_ attribute contains the value set that the value comes from, and is used for linking to the value dimension. You must import both attributes.

Manage Extensible Flexfields

Extensible Flexfields: Explained

Extensible flexfields are like descriptive flexfields, with some additional features.

- You can add as many context-sensitive segments to the flexfield as you need. You aren't restricted by the number of columns predefined and registered for the flexfield.
- You can configure a one-to-many relationship between the entity and its extended attribute rows.
 - A row of data can have multiple contexts associated with it.
 - o A row of data can have multiple occurrences of the same context.
- You can configure attributes in groups to form a context so that the attributes in the context always appear together
 in the user interface.
- You can use existing hierarchical categories so that entities inherit the contexts that are configured for their parents. Contexts are reusable throughout categories.
- Application development has registered some extensible flexfields to support view and edit privileges. For such
 flexfields, you can specify view and edit privileges at the context level to control who sees the attributes and who can
 change the attributes' values.

When you configure a context for multiple rows per entity, the segments are displayed as a table.



Unlike descriptive flexfields, the extension columns corresponding to extensible flexfields segments are part of extension tables, separate from the base application table. Unlike descriptive flexfield contexts, the set of attributes in an extensible flexfield context remains constant and doesn't differ by context value.

An extensible flexfield describes an application entity, with the run time ability to expand the database that implementation consultants can use to define the data structure that appears in the application.

Extensible flexfields support one-to-many relationships between the entity and the extended attribute rows.

To get a list of predefined extensible flexfields, open the Setup and Maintenance work area, and use the Manage Extensible Flexfields task.

The following aspects are important in understanding extensible flexfields:

- Usages
- Categories
- Pages
- Security
- Protected Extensible Flexfield Data

Usages

As with descriptive flexfields, you can define multiple usages for an extensible flexfield, which enables several application tables to share the same flexfield.

For example, a flexfield for shipping options can be used by both a Supplier table and a Buyer table. In addition, you can associate a context with one, some, or all of the flexfield's usages. Thus, with the shipping information example, you can associate a warehouse context with the Supplier usage, a delivery location context with the Buyer usage, and a ship-via context with all usages.

Usages include security information for applying no security to user access or enforcing view and edit privileges. Some product-specific extensible flexfields have specialized usage fields beyond those for security.

Categories

You can configure multiple extensible flexfield contexts and group the contexts into categories. All extensible flexfields have at least one category. For some extensible flexfields, you can configure a hierarchy of categories. A child category in the hierarchy can inherit contexts from its parent category.

You can define categories for extensible flexfields, and you can associate any combination of contexts with a given category.

For example, the Electronics and Computers category hierarchy might include a Home Entertainment category, which in turn might include an Audio category and a TV category, and so on. The Home Entertainment product might have contexts that specify voltage, dimensions, inputs and outputs. Contexts are reusable within a given extensible flexfield. For example, the dimensions context could be assigned to any category that needs to include dimensional information.

Pages

Extensible flexfields let you combine contexts into groups known as pages, which serve to connect the contexts so they will always be presented together in the application user interface.

Each application page corresponds to one extensible flexfield category, with a separate region of the page for each associated context.



Security

When you configure a flexfield, you set the privileges for a context at the usage level by selecting actions for the view and edit privileges of a context usage.

When an end user performs a search, the user interface displays only the attribute values of the contexts for which the user has view privileges. The user is able to perform a search using all attributes for all contexts, regardless of view privileges.

If end users access a context through a web service, an exception is thrown if they perform an action for which they don't have privileges.

All extensible flexfields have a base data security resource. Some data security resources for extensible flexfields are preconfigured with actions that you can use to specify access privileges. If no action is preconfigured, a security administrator can create actions and policies to support access control on the extensible flexfield attributes.

Some extensible flexfields have a translatable option; these flexfields also have a translation data security resource.

Protected Extensible Flexfield Data

Application developers may mark some data configurations in an extensible flexfield as protected, indicating that you can't edit them.

If an extensible flexfield is partially protected, then you can't edit the protected portions of the flexfield's configuration. For example:

- If an extensible flexfield context is protected, you can't edit its:
 - Context details
 - Context segments
 - Context usages
- If an extensible flexfield page is protected, you can't:
 - Edit the page details or delete the page
 - Edit the contexts associated with the page

Note:

- There is no restriction on page references to protected contexts. Custom pages you create may contain any context, whether protected or not.
- There is a restriction on category references to protected contexts. If a context is protected, you can't add it to or delete it from any category.

Related Topics

Flexfield Deployment: Explained

Managing Flexfields: Points to Consider

How can I access predefined flexfields?



Planning Extensible Flexfields: Points to Consider

Once you have identified a flexfield to configure, plan the configuration in advance. Compile a list of the UI pages and other artifacts in your deployment that are affected by the configuration. Verify that you are provisioned with the roles needed to view and configure the flexfield. View the flexfield using the Highlight Flexfields command in the Administration menu while viewing the run time page where the flexfield appears. Plan how you will deploy the flexfield for test and production users. Review the tools and tasks available for managing flexfields, such as the Define Flexfields task list, Manage Sandboxes, and Highlight Flexfields for adding and editing flexfield segments.

Planning an extensible flexfield can involve the following tasks:

- 1. Identify a hierarchical structure of categories.
- 2. Identify existing context values.
- 3. Identify custom attributes and plan the extensible flexfield segments, segment properties, and structure.
- 4. Plan validation rules.
- 5. Plan initial values.
- 6. Plan security.
- 7. Plan attribute mapping to Oracle Business Intelligence objects.

Category Hierarchy Structure

Existing category hierarchy structures provide the framework for planning what segments to add to an extensible flexfield as custom attributes of an entity.

Some Oracle Fusion applications provide user interfaces to create and manage an extensible flexfield's category hierarchy.

Contexts and Existing Context Values

If related custom attributes can be grouped together, plan adding the attributes as a context of segments, and plan the order in which the attributes should appear.

Some extensible flexfields have preconfigured context values. Region headers displayed in a the user interface page or pages that contain the flexfield segments identify existing contexts. Using the Manage Extensible Flexfields task, find and open the flexfield for editing to view the list of configured context values.

See product-specific information for guidance in using preconfigured context values.

Plan the Segments and Segment Properties

List all the custom attributes that you want to add as extensible flexfield segments.

For each segment, define properties, including the indexed property.

Plan Validation Rules

Define each segment's validation rules and check if value sets exist for those rules or you must create new ones. If you must create a value set, you can create it either before you configure the flexfield or at the same time that you create or edit a segment.

When determining a segment's validation rules, consider the following questions:

- What is the data type character, date, date and time, or number?
- Does the segment require any validation beyond data type and maximum length?
- Should a character type value be restricted to digits, or are alphabetic characters allowed?



- Should alphabetic characters automatically be changed to uppercase?
- Should numeric values be zero-filled?
- How many digits can follow the radix separator of a numeric value? In base ten numerical systems the radix separator is decimal point.
- Does the value need to fall within a range?
- Should the value be selected from a list of valid values? If so, consider the following questions:
 - Can you use an existing application table from which to obtain the list of valid values, or do you need to create a custom list?
 - oll f you are using an existing table, do you need to limit the list of values using a WHERE clause?
 - Does the list of valid values depend on the value in another flexfield segment?
 - Is the list of valid values a subset of another flexfield segment's list of values?

Plan Initial Values

For every segment, list the constant value or SQL statement, if any, to use for the initial value of the custom attribute.

Plan Security

Determine what privileges to set for view and edit access to context attributes, such as providing all end users with view access but only managers with edit access.

If your security restrictions apply to several contexts, you can create generic actions. At a minimum, create the generic actions for the base data security resource. If the flexfield has a translatable option and you plan to use translatable contexts, then also create the generic actions for the translation data security resource. For example, if the Item flexfield supports the translatable option and has a data security resource ITEM_EFF_VL in addition to the base data security resource ITEM_EFF_B, then create actions for both data security resources, such as EDIT_NONTRANS_ATTRS for ITEM_EFF_B and EDIT_TRANS_ATTRS for ITEM_EFF_VL.

If your security restrictions are more fine-grained, such as needing to secure each context with a different privilege, then you can create more fine-grained actions.

Plan Which Segments Map to Oracle Business Intelligence Objects

If an extensible flexfield has been enabled for Oracle Business Intelligence, you can make the attributes available for use in Oracle Business Intelligence applications.

Related Topics

• Flexfield Segment Properties: Explained

Managing Extensible Flexfields: Points to Consider

Configuring extensible flexfields involves managing the available flexfields registered with your application database.

The following sequence describes how to configure extensible flexfields:

- 1. Configuring contexts by creating each context segment and the context-sensitive segments for each context segment, and providing the following for each segments:
 - a. Identifying information
 - b. Column assignment



- c. Initial default value
- d. Display properties
- 2. Configuring context usages and usage security by selecting actions to which users should have access:
 - View
 - Edit
 - o None, if no special privileges should be enforced.
- 3. Configuring categories and category details.
- 4. Associating contexts with a category.
- 5. Creating logical pages for a category.

The following aspects are important in understanding extensible flexfield management:

- Contexts and pages
- Categories
- Initial values
- Adding segments to highlighted extensible flexfields
- Indexed segments
- Security
- Deployment

Contexts and Pages

Each context is displayed to end users as a region containing its context-sensitive segments. You can specify instruction help text to display instructions that explain how to use the region and its attributes to end users. Instruction help text is displayed at the top of the context region. A context can be defined as single row or multi row. Single row contexts are the same as descriptive flexfields contexts. A single row context has only one set of context-sensitive segments. A multi-row context enables you to associate multiple sets of values with the same object instance.

For example, for a BOOK table, you could create a multi row context named chapters that contains a segment for chapter and a segment for number of pages. Multiple chapters can then be associated with each book in the BOOK table.

For contexts that store multiple rows, you can uniquely identify each row by having the values in each row form a unique key.

If flexfield has a category hierarchy, then you can leverage the hierarchy to reuse contexts for similar entities, such as similar items in a product catalog.

Set the context to translatable so that free-form text entered by end users is stored in the language of the user's locale, and different translations of that text can be stored in other languages. Segments in the translated contexts should utilize format-only value sets for storing free-form, user-entered text.

Set the context security to give an end user view or edit access to a context. The context's task flow and region appear in the user interface only for users with view access. With edit access, an end user can edit the context's attribute values. With no action specified for a usage, no special privileges are enforced through the context's configuration.

Define logical pages to group contexts together in the user interface. For a given category, you may create one or more logical pages. You may add one or more of the category's associated contexts to each of the category's logical pages.

You can specify:

- The sequence of the contexts within each page.
- The sequence in which the logical pages appear.



• Instruction help text to display instructions that explain how to use the page to end users. Instruction help text is displayed at the top of the logical page, preceding all of its context regions.

Categories

A category is a grouping of related data items that can be considered to belong together. You can associate any combination of contexts with a given category. Extensible flexfields with more than 30 categories must be deployed as a background process.

A category hierarchy logically organizes a set of categories. For example, the Electronics and Computers category hierarchy might include a Computer category and a Home Entertainment category, which in turn might include an Audio category and a TV category, and so on.

A category can be a child or sibling of an existing category. The hierarchy can be as simple or as complex as desired, with any combination of zero or more sibling categories and zero or more child categories. If no category is defined, the data items are grouped under a single predefined default category.

Each category has associated contexts that store relevant information about a data item in that category. For example, a Home Entertainment product has contexts that specify Voltage, Dimensions, Inputs and Outputs. Contexts are reusable within a given extensible flexfield. Then, the Dimensions context could be assigned to any category that needs to include dimensional information.

If a hierarchy includes child categories, each child category inherits the contexts from its parent category; for example, the Home Entertainment category inherits Voltage and Dimensions from the Electronics and Computers category.

Each extensible flexfield is associated with a particular category hierarchy. Consider category hierarchies to be defining framework for extensible flexfields and their contexts. A category hierarchy specifies which contexts are valid for each category.

An extensible flexfield can include multiple contexts which you define to support a given category. These contexts can be suitable for various purposes, but within a particular category, some contexts might be considered to be related to, or dependent on, each other. You can combine these contexts into groups known as logical pages, and determine the sequence in which the pages appear. This serves to connect the contexts so they will always be presented together and in a particular order in the application user interface.

For example, the Home Entertainment category might have an Electrical Specifications page that contains the Voltage, Inputs and Outputs contexts, and a Physical Specifications page that contains the Dimensions and Form Factor contexts.

Initial Values

The SQL statement defining an initial value must be a valid statement that returns only one row and a value of the correct type.

You can use two types of SQL statements:

- SQL statement with no binding. For example, select MIN(SALARY) from EMPLOYEES.
- SQL statement with bind variables. You can use the following bind variables in the WHERE clause of the SQL statement.
 - : { SEGMENT . < segment_code > }: Identifies a segment in the same context.
 - : {context.<context_code>; segment.<segment_code>}: Identifies a segment in a different context. The context must be in the same category or in an ancestor category, and it cannot be a multiple-row context.
 - :{VALUESET.<value_set_code>}: Identifies the closest prior segment in the same context that is assigned to the specified value set.
 - : {FLEXFIELD. < internal_code>}: Identifies a flexfield.



For more information about using bind variables, see the help for value sets.

Adding Segments to Highlighted Extensible Flexfields

When you highlight flexfields on a run time page and use an **Add Segment** icon button to create a segment, the segment code, name, description, table column, and sequence number are set automatically. If you use an Add Segment icon button to configure extensible flexfield segments, you can't use an existing value set. Value sets are created automatically when you add segments. You can enter the valid values, their descriptions, and the default value or specify the formatting constraints for the value set, such as minimum and maximum values.

Depending on display type, the value set you create with the **Add Segment** icon button is either an independent value set or a format-only value set. The table shows which type of value set is created depending on the segment display component you select.

Display Component	Value Set Created with Add Segment
Check Box	Independent
Drop-down List	Independent
List of Values	Independent
Radio Button Group	Independent
Text Field With Search	Independent
Text box	Format Only
Text area	Format Only
Rich Text Editor	Format Only
Date/Time	Format Only



Tip: After you add a context value, refresh the page to see the new value.

Indexed Segments

You can designate an extensible flexfield segment as indexed so that it's one of the selectively required attributes a user can use in an attribute search. If you indicate in the Manage Extensible Flexfield UI page that a segment should be indexed, the column representing the segment must be added to the database index. Commonly, a database administrator (DBA) adds columns to the database index.

When an extensible flexfield with indexed segments is deployed, search task flows are generated along with the other flexfield artifacts and specify the indexed attributes as selectively required. In the deployed extensible flexfield's search task flow, an end user must specify at least one of the indexed attributes in the search criteria. This prevents non-selective searches, which could cause performance issues.



For example, if you index the memory and processor attributes and ensure that the corresponding columns in the database are indexed, a user can search an item catalog for computers by entering processor or memory or both as a search criteria. No search is performed if an end user enters an attribute that isn't indexed as a search criterion.

Security

An extensible flexfield's base data security resource typically has a name with an _B suffix. The translation data security resource is a view of a translation table that typically has a name with an _VL suffix.

If a flexfield supports the translatable option and has a translation data security resource, make sure that you create the action for the appropriate data security resource.

- If you create a context-specific action for a nontranslatable context, add it to the base data security resource.
- If you create a context-specific action for a translatable context, add it to the translation data security resource.

Deployment

You can only deploy extensible flexfields using the Manage Extensible Flexfields task. You can deploy extensible flexfields offline as a background process and continue working in the session without having to wait for the deployment to complete. You can queue up several extensible flexfields and deploy as a background process. The flexfields are deployed, one at a time, in the order that you deploy them to the queue. You must deploy extensible flexfields with more than 30 categories as a background process.

You can remove an extensible flexfield from the deployment queue with the Cancel Background Deployment command. When an extensible flexfield is deployed in a background process, its offline status indicates that the flexfield is in a background deployment process. A flexfield's offline status is cleared and it's deployment status updated when the background deployment process has completed.

Note: The Offline Status column refreshes when you perform a new search in the Manage Extensible Flexfields task.

Related Topics

- Why did my flexfield changes not appear in the run time UI?
- Flexfield Usages: Explained
- Why can't I edit my flexfield or value set configuration?

Enabling Extensible Flexfield Segments for Business Intelligence: Points to Consider

An extensible flexfield that is registered in the database as enabled for Oracle Business Intelligence (BI) includes a BI Enabled setting for each of its segment instances. When a segment instance is BI-enabled, it's available for use in Oracle Business Intelligence.

The following aspects are important in understanding BI-enabled extensible flexfield segments.

- Flattening business components to use BI-enabled segments in Oracle BI
- Mapping attributes of flattened business components to logical objects in Oracle BI

After you deploy a business intelligence-enabled flexfield, use the Import Oracle Fusion Data Extensions for Transactional Business Intelligence process to import the flexfield changes into the Oracle Business Intelligence repository. Users can make



use of the newly-generated attributes in business intelligence applications. For additional information about logical objects and import, refer to the Oracle Transactional Business Intelligence Administrator's Guide.

Flattening

When you deploy a business intelligence-enabled extensible flexfield, the deployment process generates an additional set of flattened business components for use in business intelligence. The flattened business components include attributes for business intelligence-enabled segment instances only.

If you assigned a label to a segment, the flattened components include a single attribute representing all segment instances with that label. If you didn't assign a label, the flattened components include a discrete attribute for each BI-enabled segment instance in each structure.

Importing to Oracle Business Intelligence Repository

After you deploy a business intelligence-enabled flexfield, import the flexfield changes into the Oracle Business Intelligence repository to make use of the newly flattened business components in business intelligence and then propagate the flexfield object changes. When you import the metadata into the Oracle Business Intelligence repository, you must do so as the FUSION_APPS_BI_APPID user. To import flexfield changes into the Oracle Business Intelligence repository in Oracle Cloud implementations, run the Import Oracle Fusion Data Extensions for Transactional Business Intelligence process. For additional information about import, refer to the Oracle Transactional Business Intelligence Administrator's Guide.

▼ Tip: When you import a flexfield into the Oracle Business Intelligence repository, you see both <name>_ and <name>_ attributes for each segment, along with some other optional attributes. The <name>_ attribute contains the value. The <name>_ attribute contains the code of the value set that the value comes from, and is used for linking to the value dimension. You must import both attributes.

Managing Extensible Flexfield Categories: Points to Consider

Categories are a way of extending the number of context-sensitive segments for a flexfield beyond the columns reserved for flexfield segments.

An Items extensible flexfield has a category for each item and each category can have one or more contexts. The laptop item belongs to the Computers category. Since extensible flexfields are mapped to separate extension tables, not just to columns as with descriptive flexfields, the thirty reserved columns on the extensible flexfield table let you define up to thirty context-sensitive segments for each context.

If you add a Dimensions context to the Computers category, thirty segments are available. But if you need to add more than thirty attributes, create another context and associate it to the same category. You could now add an Electronics Attributes context to the same Computers category in which you create another thirty segments.

You can continue creating more contexts and adding them to the Computers category. In this way your laptop computer item can be extended with as many attributes as you need, because it is mapped to a category and you can keep adding contexts to that category.

A descriptive flexfield on an items table with thirty columns reserved for segments can only have a single context. Once you configure the columns for that one context, you cannot create any more segments.

Predefined and Preconfigured Categories

How you structure the flexfield configuration depends on how categories are defined for the flexfield. If the extensible flexfield is preconfigured with one category, associate all your contexts and pages with that category. If a product-specific extensible flexfield is preconfigured with several categories, associate your contexts and pages with those categories. If the extensible



flexfields provide user interfaces for configuring multiple categories, associate a context with more than one category using inheritance.

Some products provide an activity or task for creating and maintaining categories for an extensible flexfield. See product-specific information to determine if you can create categories for the flexfield.

You can view a flexfield's category hierarchies by using either the Highlight Flexfields feature or the Manage Extensible Flexfields task to find and open the flexfield for editing.

Disabling Categories

While configuring an extensible flexfield, you can disable a category. The Enabled column in the Category table of the Edit Extensible Flexfield page, indicates which categories are enabled.

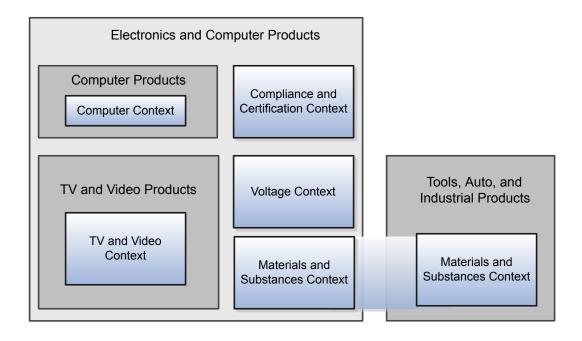
Note: When you deploy an extensible flexfield that has a disabled category, that category and its descendant categories aren't deployed. Contexts and their segments are deployed only if they belong to at least one enabled category.

Contexts

Group similar custom attributes into contexts. The group is displayed together in a region. The region's header is the context value.

If a category hierarchy exists for the flexfield, then you can leverage the hierarchy to reuse contexts for similar entities, such as similar items in a product catalog.

The figure shows the Item Extended Attributes flexfield, which uses the category hierarchy feature to reuse contexts. The flexfield's Electronics and Computers category contains contexts for compliance and certification, voltage, and materials and substances. The TV and Video subcategory and the Computer Products subcategory inherit the Electronics and Computer contexts in addition to having their own contexts. The Materials and Substances context belongs to both the Electronics and Computer Products category and the Tools, Auto, and Industrial Products category.



The table shows an example of category hierarchy for an extensible flexfield.



Display Name	Code	Description
Electronics and Computers	PROD_ ELECTRONICS	Electronics and Computers
TV and Video	PROD_TV_VIDEO	Television and Video
Computers	PROD_COMPUTERS	Computers
Office Products and Supplies	PROD_OFFICE_PRODUCTS_SUPPLIES	Office Products and Supplies
Tools, Auto, and Industrial	PROD_TOOLS_AUTO_INDUSTRIAL	Tools, Automotive, and Industrial
Sports and Outdoors	PROD_ SPORTS_ OUTDOORS	Sports and Outdoors

To store voltage information for all electronic and computer items, associate a Voltage context with the Electronics and Computers category. Both the TV and Video subcategory and the Computers subcategory then inherit the Voltage context from the parent Electronics and Computers category.

Configuring an Item Extended Attributes Flexfield: Example

The Item Extended Attributes flexfield provides segments for extending the Item business object. In the Manage Extensible Flexfields task, you configure your product business object to include a Technical Specifications logical page in the user interface for the Electronics and Computers category of items.

In this example, your configuration of this flexfield groups custom attributes into the following contexts:

- Materials and Substances
- Compliance and Certification
- Voltage

Scenario

The following list shows an example plan for custom computer attributes for the Item Extended Attributes flexfield. In this example, the Electronics Information page is inherited from the parent Electronics and Computers category.

- Page: Electronics Information
 - Context: Compliance and Certification, single row
 - ISO 14001 (International Organization for Standardization for an Environmental Management System)
 - ENERGY STAR (energy efficiency guidelines)
 - ROHS (Restriction of the use of certain hazardous substances in electrical and electronic equipment)
 - o Context: Voltage, single row
 - Minimum voltage
 - Maximum voltage
 - Current type



- Context: Materials and Substances, multiple rows
 - Material
 - Contain recyclate
 - Percent unit mass
- Page: Computer Information
 - o Context: Processor Specifications, single row
 - Manufacturer
 - CPU type
 - Processor interface
 - Processor class
 - Processor speed
 - Cores

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
Which extensible flexfield is available for configuring a hierarchy of categories?	Item Extended Attributes flexfield

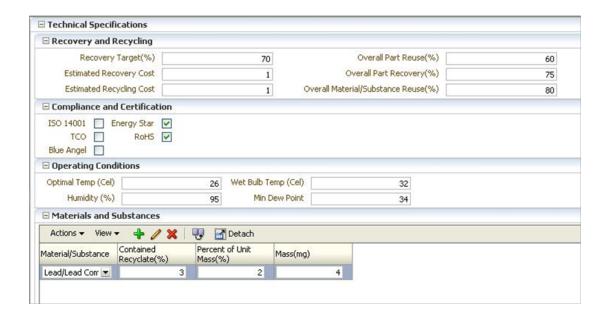
Collecting Technical Specifications

Your product inventory pages for electronics and computers require a technical specifications page. Your product inventory pages for furniture require a furniture specifications page and an assembly instructions page. Items in both the electronics and computer category, and in the furniture category, share attributes for specifying materials and substances.

The figure shows a Technical Specifications logical page in the user interface for the Electronics and Computers category, with attributes in the context of Recovery and Recycling, Compliance and Certification, Operating Conditions, and Materials



and Substances. The Materials and Substances context is configured for multiple rows so your users can select all the materials and substances required to make a single product, displayed as attribute values in a table.



Analysis

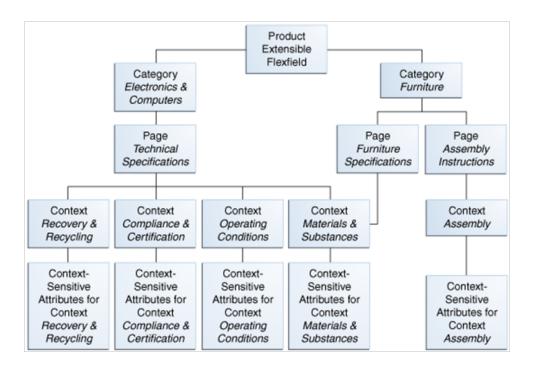
You use logical pages to arrange how the contexts appear in the user interface. Use a context to store all the materials and substances required to make a single product. You can configure a context to store multiple rows per entity. The multiple rows are displayed in a table, as for the Materials and Substances context.

The Technical Specifications logical page contains the attributes for the four contexts.

- Recovery and Recycling
- · Compliance and Certification
- Operating Conditions
- Materials and Substances



In the figure, the Furniture category is configured to include a Furniture Specifications logical page and an Assembly Instructions logical page. The two categories (Electronics & Computers and Furniture) share the Materials & Substances context.



Configure Security for the Item Flexfield Configuration

The following table shows an example of data security policies for the Item flexfield.

Data Security Resource	Policy	Role	Actions	Condition
ITEM_EFF_B	А	VOLTAGE_SPEC	edit_ nontrans_ voltage_ctx	All values
ITEM_EFF_VL	В	COMPLIANCE_SPEC	edit_ trans_ compliance_ ctx	All values
ITEM_EFF_VL	C	COMPUTER_SPEC	edit_ trans_attrs	ComputerCategoryFilter
ITEM_EFF_VL	D	TELEVISION_ SPEC	edit_ trans_attrs	TVCategoryFilter

The following table shows the privileges for three of the flexfield's contexts.

Context	Edit Privilege	View Privilege
Voltage	edit_ nontrans_ voltage_ctx	NONE



Context	Edit Privilege	View Privilege
Compliance and Certification	edit_ trans_ compliance_ ctx	NONE
Materials and Substances	edit_ trans_attrs	NONE

In this example, anyone can view the contexts' attributes, but the edit privileges are restricted as follows:

- Voltage: Editable only by voltage specialists.
- Compliance and Certification: Editable only by compliance specialists.
- Materials and Substances: Only computer specialists can edit these attributes for items in the computer category.
 Only television specialists can edit these attributes for items in the TV category.

In this example, the Materials and Substances context is secured by a generic action with a condition applied to restrict access by category. Voltage and Compliance and Certification are secured by actions specific to each context.

FAQs for Manage Extensible Flexfields

Why did the extensible flexfield context not appear at run time?

If a deployed extensible flexfield context doesn't appear in the user interface, verify that the context is associated with one of the category's pages defined for the extensible flexfield.

Related Topics

Why did my flexfield changes not appear in the run time UI?

Manage Key Flexfields

Key Flexfields: Explained

Key flexfields provide a means to capture a key such as a part number, a job code, or an account code. A key flexfield consists of one or more segments, where each segment can have a meaning.

For example, a part number 10-PEN-BLA-450 might correspond to a black pen from supplier #450 sold by division #10 (office supplies). Behind the scenes, the application uses a unique number, 13452, for this part, but the user always sees the 10-PEN-BLA-450 part number.

The following aspects are important to understanding key flexfields:

- Architecture
- · Segments and segment labels
- Structures
- Segment and structure instances



- Combinations
- Dynamic combination creation
- Security

Key flexfields aren't optional. You must configure key flexfields to ensure that your applications operate correctly. You configure and maintain key flexfield definitions with the Manage Key Flexfields task. To get a list of predefined key flexfields, open the Setup and Maintenance work area, and use the Manage Key Flexfields task. For information about specific key flexfields, see the help for the product where the associated business component is implemented.

Architecture

Flexfield metadata is stored in the flexfield metadata tables. When you configure a key flexfield, you define metadata about the key flexfield covering aspects such as:

- Segments are in a structure
- · Structures in the flexfield
- Value sets in each segment

Based on the flexfield metadata, actual part numbers are captured at run time as a combination of segment values and stored in a combinations table. A combinations table contains all the segment columns for a flexfield, a unique ID column, and a structure instance number column. The structure instance number column differentiates multiple arrangements of the segment columns. For example, a part number containing multiple segments can be represented by a key flexfield. A part number key flexfield has a corresponding combinations table. In that table, the flexfield stores a list of the complete codes, with each segment of the code in a column, with the corresponding unique ID and structure instance number for the code. When users define a new part number or maintain existing part numbers in the parts catalog, they directly maintain rows in the combinations table.

The foreign key table contains a different business entity than the combinations table. For example, the business entity in the foreign key table is order lines or invoice lines that contain foreign key references to parts for ordering. Any number of foreign key tables can reference a particular entity represented by a key flexfield.

Segments and Segment Labels

A key flexfield contains segments and a segment label identifies a particular segment within a key flexfield. Segment labels are defined and made available by the product development. A segment contains the following details:

- A prompt
- A short prompt
- Display width
- The sequential position of the segment within the key flexfield structure
- The range type
- · Column name of the attribute being stored by the segment
- A default value set
- A label for the segment

Applications identify a particular segment for some purpose such as security or computations. Segment name or segment order cannot reliably identify a segment because key flexfield segments can be configured to appear in any order with any prompts. A segment label functions as a tag for a segment.

For example, the requirement is to identify which segment in the accounting flexfield contains balancing information and which segment contains natural account information. A segment label determines which segment you are using for natural account information. When you define your accounting flexfield, you must specify which segment label apply to which



segments. Some labels must be unique, and cannot be applied to more than one segment in each structure. Other labels are required, and must be applied to at least one segment in each structure.

A segment label helps a user searching for segments, such as the Cost Center label for all segments across key flexfields that store a value for the cost center.

Structures

A key flexfield structure definition includes the number of segments and their order.

In some applications, different users like to see different segment structures for the same flexfield. A key flexfield can have multiple structures if registered to support more than one structure.

The flexfield can display different fields for different users based on a data condition in your application data, such as the value of another field entered by the user or the user's role. For example, the correctly formatted local postal address for customer service inquiries differs based on locale. A postal address key flexfield could display different segments and prompts for different users based on a location condition in your application data, such as the user's role or a value entered by the user.

Each structure can have one or more segments. Thus a segment is a child of a structure. To store a particular segment, such as Cost Center, in two different structures, you must define the segment separately in each structure. Each structure may have one or more structure instances. Each instance of a structure shares the same number and order of segments, but differs in the values or value sets used in validating the segments.

Structure and Segment Instances

You can define multiple configurations of a key flexfield structure. These structure instances have the same segment structure, in the same sequence order. They differ primarily in how each segment is validated. You define a structure instance for each key flexfield and each key flexfield structure instance.

The segments in a key flexfield structure instance are segment instances. A segment instance is a segment with a specific value set assigned to it. If a key flexfield is registered with a tree structure, you can specify a tree code for a segment instance.

Combinations

A combination is a complete code, or combination of segment values that makes up the code, that uniquely identifies an object.

For example, each part number is a single combination, such as PAD-YEL-11x14 or 01-COM-876-7BG-LTN. In these combinations, the hyphen is the segment separator. If you have ten parts, define ten combinations. A valid combination is an existing or new combination that can be used because it's currently active and doesn't violate cross-validation or security rules. A combination has different segments depending on the flexfield structure being used for that combination. Any combination is associated with only one particular flexfield structure.

Many applications refer to a key flexfield combination by using the name of the entity or the key flexfield itself. For example, Assets uses the asset key flexfield and refers to one of its combinations as an asset key or asset key flexfield. In another example, Oracle Fusion General Ledger refers to combinations of the accounting flexfield as account or GL account.

Each key flexfield has one corresponding table, known as the combinations table, where the flexfield stores a list of the complete codes, with one column for each segment of the code, together with the corresponding unique ID number (an account combination ID) for that code. Then, other tables in the application have a column that stores just the unique ID for the code. For example, you may have a part number code, such as PAD-YEL-11x14. The Parts combinations table stores that code along with its ID, 57494. If your application lets you take orders for parts, you might then have an Orders table that stores orders for parts. That Orders table would contain a single column that contains the part ID, 57494, instead of several columns for the complete code PAD-YEL-11x14. Typically, one combinations page maintains the key flexfield, where the key flexfield is the representation of an entity in your application. Maintain individual combinations, such as part numbers in the combinations page.



Dynamic Combination Creation

Dynamic combination creation is the insertion of a new valid combination into a combinations table from a page other than the combinations page. Dynamic combination creation may be enabled at the following levels.

Level Of Dynamic Combination Creation	Controlled By:
Flexfield	Application development
Each usage or reference to the key flexfield	Application development
Structure instance	Administrators and implementation consultants
Other	Administrators and implementation consultants

If your key flexfield or certain usages or references of the key flexfield don't permit dynamic combination creation, you may control whether dynamic combination creation is enabled for each structure instance. If enabled, a user can enter a new combination of segment values using the flexfield window from a foreign key page. For example, when entering a transaction, a GL user can enter a new expense account combination for an account that doesn't yet exist. Your application creates the new account by inserting the new combination into the combinations table behind the scenes. Assuming that the new combination satisfies any existing cross-validation rules, the flexfield inserts the new combination into the combinations table, even though the combinations table isn't the underlying table for the foreign key page.

Related Topics

Flexfield Deployment: Explained

Managing Flexfields: Points to Consider

How can I access predefined flexfields?

Planning Key Flexfields: Points to Consider

Your first step in planning your key flexfields is to determine which key flexfields your application requires.

Your plan should include:

- The purpose of the key flexfield
- The number and length of its available segment columns
- Whether your key flexfield allows more than one structure
- Whether more than one structure must be defined
- The number, order and length of your segments for each structure

Consider the following aspects in planning flexfields:

- Before you begin
- Access to flexfield-related tasks
- Restrictions



Validation rules for flexfield segments

Before You Begin

Once you have identified a flexfield to configure, plan the configuration in advance. Compile a list of the UI pages and other artifacts in your deployment that are affected by the configuration. Verify that you are provisioned with the roles needed to view and configure the flexfield. View the flexfield using the Highlight Flexfields command in the Administration menu while viewing the run time page where the flexfield appears. Plan how you will deploy the flexfield for test and production users.

Review the tools and tasks available for managing flexfields, such as the Define Flexfields task list and Manage Sandboxes.

If you plan to use value sets, create them before configuring the key flexfield. You cannot create value sets for key flexfields at the time that you add and configure key flexfield segments.

Access to Flexfield-Related Tasks

To access tasks for configuring flexfields and value sets, you must be provisioned with roles that entitle you to access the tasks in the Define Flexfields task list or tasks for managing product-specific flexfields. Contact your security administrator for details. For information about product-specific flexfield tasks, such as Manage Fixed Assets Key Flexfields, consult the product-specific documentation in Oracle Fusion Applications Help.

Restrictions

If you plan to use value sets, create them before configuring the flexfield.

Plan your key flexfield configuration to scale to your enterprise needs. For example, if you expect to disable old cost centers and enable new ones frequently, plan a larger maximum size for your cost center value set so that you can have more available values. One thousand available values for a 3-character value set provides more room for changes than 100 available values for a 2-character value set.

Note the code name of the flexfield you intend to configure so you can find it easily in the Define Flexfield task list or tasks for managing product-specific key flexfields.

In some cases you can customize how the flexfield appears on the page.

See Oracle Fusion Applications Help for specific products to determine any restrictions on using product-specific key flexfields.

Reporting

If you want to report on your data by certain criteria or sub-entities, such as account number or project or region, consider making that sub-entity a distinct segment, rather than combining it with another sub-entity, so that you can categorize and report on smaller discrete units of information.

Related Topics

Flexfields and Value Sets: Highlights

Planning Value Sets: Points to Consider

Managing Key Flexfields: Points to Consider

Consider the plans for a key flexfield, security, and resulting run time pages when configuring key flexfields.



Planning

Plan structures carefully and allow for future needs. Don't change the number, order, and maximum length of segments once you have acquired flexfield data.

Structure Delimiters

A delimiter separates the segments when they appear to end users. The delimiter value of a structure specifies the character used to visually separate segment values when the key flexfield is displayed as a string of concatenated segments in the UI.

Choose the delimiter value of your key flexfield carefully so that it doesn't conflict with the flexfield data. For example, if your data frequently contains periods, such as in monetary or numeric values, don't use a period as your segment separator. Any character you expect to appear frequently in your segment values or descriptions isn't a good choice for the delimiter. If you change the configuration of a key flexfield, such as the delimiter, the change affects the previously stored key flexfields with that structure.

Security

Oracle Fusion data security enforces value set security.

Within key flexfields, value set security applies to the selection of the individual segment values in the segment list of values. When selecting a key flexfield segment value from the combinations table, data security allows display of only the combinations whose segment values you have access to. Applications development controls whether or not value set security rules propagate to the foreign key table. By default they do.

Run Time Pages

Application development determines the user interface (UI) pages used to render flexfields. The types of key flexfield UI pages are as follows:

- Combinations pages where the underlying entity objects use the combinations table itself
- · Foreign key pages where the underlying entity objects contain a foreign key reference to the combinations table
- Partial usage pages where some or all of the key flexfield's segment columns are in a product table

The same key flexfield can be used in different ways on different pages.

A page with a foreign key reference has a base table or view that contains a foreign key reference to a combinations table with the actual flexfield segment columns. This lets you manipulate rows containing code combination IDs (CCID).

A page with partial usage of a key flexfield presents segments that are defined on a product's transactional table in addition to being defined on a combinations table. In the case of a partial usage page, it is possible that only part of the configuration is visible. This enables the key flexfield to behave more like a descriptive flexfield.

A code combination maintenance page or combinations page presents the combinations table. This enables directly creating and maintaining code combinations. The combinations table contains all key flexfield segment columns and a unique ID column.

A typical application has only one combinations page. An application might not have a combinations page if it doesn't support maintenance by administrators.

A page containing a search region enables end users to select which attributes of the key flexfield view object to use as criteria to search for flexfield metadata.

For example, you can configure seven segments for the Account key flexfield. In a foreign key reference page, end users see the typical key flexfield picker with all seven segments where they can search for combinations. In a partial usage page using



the same key flexfield, end users potentially could see only a single segment such as the Cost Center labeled segment, or they might see multiple segments but displayed as individual segments rather than as a picker for choosing combinations.

For more information on key flexfield pages, see the Oracle Fusion Applications Developer's Guide.

Related Topics

• Flexfield Usages: Explained

Key Flexfield Structures: Explained

A key flexfield structure arranges the segments of a key so that you can reuse a single key flexfield in multiple combinations of the same segments or a subset of those segments. Multiple instances of a single structure can accommodate differences in the value sets assigned to the structure's segments.

The structure determines the following aspects of a key flexfield:

- The segments to include
- The order of the segments
- · Segment labels on the included segments
- Properties for each segment applied to the instances of the segments in an instance of the structure

Managing Key Flexfield Structures

All the segments defined for a key flexfield are available to be included in a key flexfield structure.

You can define as many segments as there are defined segment columns in your key flexfield combinations table. Ensure that you add segments in the order that your key requires. Once deployed, the order cannot be changed.

Enable segments to indicate that they are in use. A flexfield doesn't display disabled segments in run time. To protect the integrity of your data, disable a segment if you have already used it to enter data.

Key Flexfield Structure Instances and Segment Instances: Explained

A key flexfield structure can have one or more alternate structure instances.

The instances of a key flexfield structure share the following aspects of the structure:

- The same set of segments
- The same arrangement of segments
- The same properties at the segment and structure levels

The differences among structure instances include whether dynamic combination creation is allowed. Likewise, at the structure instance level, differences among segment instances are based on the following:

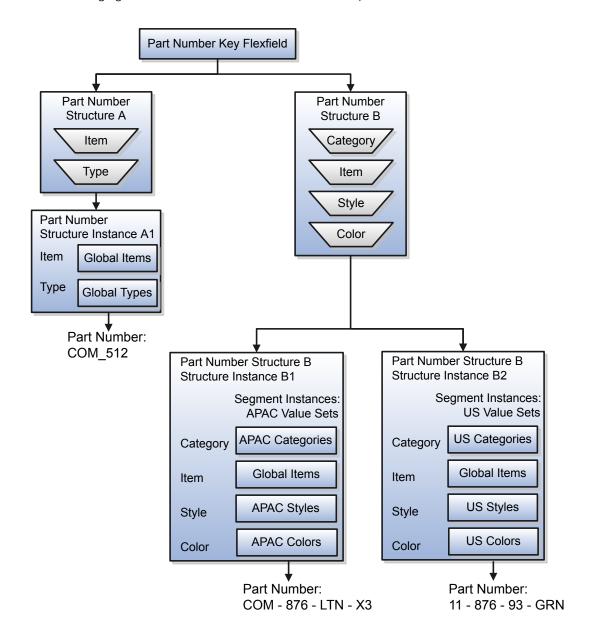
- Value set
- Default type and default value



- Tree code
- Whether the segment is any of the following:
 - Required
 - Displayed
 - Enabled for business intelligence
 - Optional or required as a query criterion

For example, you can use one group of value sets for the US and another for France.

The following figure shows two structures instances for a part number structure.





The structures differ in the number of segments and the segment separators used. The structure instances of a structure share all properties defined for that structure. However, the structure instances may vary if the properties are defined at the structure instance or segment instance level. For example, the value set assigned to the segment instances.

Query Required Segment Instances

You can designate a key flexfield segment instance as query required to make it a selectively required attribute. A user can use it a key flexfield combination search. If you indicate on the Manage Key Flexfields UI page that a segment instance requires indexing, add the column representing the segment to the database index. Commonly, a database administrator (DBA) adds columns to the database index.

Following deployment, the combination picker of the key flexfield displays the query required attributes as selectively required. An user must specify at least one of the query required attributes in the search criteria. This prevents unnecessary searches that could cause performance issues.

For example, you mark the cost center and account attributes as query required and ensure that the corresponding columns in the database are indexed. A user can search for combinations by entering cost center or account or both as search criteria. No search is performed if a user doesn't enter at least one query required attribute as search criteria.

V Tip: Inde

Tip: Index the Structure Instance Number column on your combinations table to improve run time performance.

Dynamic Combinations

If a key flexfield supports dynamic combination creation, you can select to enable this feature by selecting **Dynamic Combination Creation Allowed**. As a result, users enter values at run time that produce new account combinations for the flexfield. If **Dynamic Combination Creation Allowed** isn't enabled, new valid combinations can only be entered using the combinations table for the flexfield.

Trees

You may define a tree code for the value set assigned to the segment instance. When you assign the tree code to the segment instance, tree hierarchy search operations are available on the segment values.

For a segment instance to be based on a tree, the following must be true.

- Application development registered the key flexfield with a tree structure. The tree structure may be fixed across all segments in the flexfield, or may vary across segments.
- · A tree code for that tree structure exists.
- The tree code includes tree versions containing the values of the value set assigned to the segment instance.
- You assign the required tree code directly to the segment instance.

If these conditions are satisfied, different segment instances that use the same value set can be assigned the same or different tree codes. They use a different hierarchy definition over the same values.

Related Topics

Flexfield Segment Properties: Explained



Cross-Validation Rules: Explained

You can control the creation of new key flexfield code combinations by defining cross-validation rules. A cross-validation rule defines validation across segments and enforces whether a value of a particular segment can be combined with specific values of other segments to form a new combination.

The table compares segment validation to cross-segment validation:

Type of validation	Type of control
Segment validation	Controls the values you can enter for a particular segment
Cross-segment validation	Controls the combinations of values that administrators and end users can create for key flexfields

Note: You can use cross-validation rules for any key flexfield that has cross-validation enabled. See the documentation for your key flexfield to determine if it supports cross validation.

Cross-validation rules prevent the creation of combinations with values that shouldn't coexist in the same combination. For example, your company requires that all revenue accounts must have a specific department. Therefore, account combinations that have revenue account values, such as all values between 4000 and 5999, must have a corresponding department value other than 000, which indicates no department is specified. You can define cross-validation rules that disallow creation of combinations with incompatible segments, such as 4100-000 or 5000-000.

Alternatively, suppose your accounting key flexfield has an Organization segment with two possible values, 01 and 02. You also have a Natural Account segment with many possible values, but company policy requires that Organization 01 uses the natural account values 001 to 499 and Organization 02 uses the natural account values 500 to 999. You can create cross-validation rules to ensure that users cannot create a general ledger account with combinations of values such as 02-342 or 01-750.

The following aspects are important to understanding cross-validation rules:

- Rule Definitions
- Enforcement
- Timing

Rule Definitions

Cross-validation rules consist of the following information:

Rule Feature	Purpose
Name	Uniquely identifies cross-validation rules in a deployment.
Description	Helps administrators identify the purpose of the rule.
Error message	Explains why the attempted combination violates the rule.
Start Date, End Date	Indicates the period of time when the rule is in effect.



Rule Feature	Purpose
Enabled	Determines whether the rule is enforced.
Condition filter	Determines the conditions under which an enabled cross-validation rule should be evaluated.
Validation filter	Determines the validation that the rule enforces when that condition is met.

When the event specified in the condition filter is applicable, the validation filter condition must be satisfied before the combination can be created. If the event specified in the condition filter isn't applicable, then the combination is considered to pass the rule and the rule won't be evaluated even if it is enabled.

Note: If you don't specify any statement in the condition filter, then the condition is always true and the rule is always evaluated.

Enforcement

Cross-validation prevents creation of invalid combinations by administrators using maintenance pages and end users using dynamic insertion in foreign key pages.

Enabled rules are enforced when there is an attempt to create a new combination of segment values. Disabled rules are ignored. Deleting the rule has the same effect, but you can re-enable a disabled rule.

Timing

When users attempt to create a new combination, the key flexfield evaluates any cross-validation rules that are enabled and in effect.

Note: Cross-validation rules have no effect on combinations that already exist. The flexfield treats any existing invalid combinations that pre-date the rule as valid.

If you want to prevent users from using previously existing combinations that are no longer valid according to your cross-validation rules, manually disable those combinations using the combinations page for that key flexfield.

When defining a cross-validation rule, specify a start and end date to limit the time when the rule is in effect. The rule is valid for the time including the From and To dates.

Cross-Validation Rules: Points to Consider

When you need key flexfield combinations of segment values validated across segments, you can optimize your cross-validation rules to improve the experience of administrators and end users.

Consider the following when defining cross-validation rules:

- Filters
- Rule Complexity
- Maintenance



Filters

A cross-validation rule includes a condition filter and a validation filter.

The rule is evaluated using the following logic: If the condition filter is satisfied, then validate that the validation filter is satisfied.

- 1. The condition filter describes the event under which the rule will be evaluated. If the event specified in the condition filter isn't applicable, then the rule won't be evaluated even if it is enabled.
- 2. When the event specified in the condition filter is applicable, the validation filter condition must be satisfied before the combination can be created.

For example, if your organization has determined that a certain company value, Operations, cannot use a specific cost center, Marketing, you can define a cross-validation rule to validate your combinations.

- 1. The rule evaluates the company condition filter.
- 2. When company is equal to Operations, the rule evaluates the cost center validation filter.
- 3. When cost center is equal to Marketing, the rule prevents a combination from being created.
- **4.** The error message you defined for the rule displays to inform the user that the attempted combination violates the rule.
- Note: This rule doesn't affect the creation of combinations with Marketing cost center and company values other than Operations.

Rule Complexity

For optimal performance and ease of understanding, define several simple validation rules instead of using one complex rule. Simple validation rules let you provide a more specific error message and are easier to maintain over time.

Avoid rules that control validation across more than two segments, where possible. While you can define cross-validation rules that span two or more segments, keep in mind that it becomes more difficult to interpret cross-validation error messages and correct invalid key flexfield combinations as your rules encompass more segments.

Maintenance

To maintain consistent validation, review existing key flexfields when you update your cross-validation rules. Regardless of your current validation rules, Oracle Fusion Applications accept a key flexfield combination if the combination already exists and is enabled. Therefore, to ensure accurate validation, you must review your existing combinations and disable any combinations that don't match the criteria of your new rules.

Tip: To keep this type of key flexfield maintenance to a minimum, decide upon your cross-validation rules when you first set up your key flexfield structure. Define cross-validation rules before creating combinations and before combinations are used in transactions.

If you want to prevent users from using previously existing combinations that are no longer valid according to your cross-validation rules, disable those combinations using the combinations page.

Editing a Cross-Validation Rule: Example

Cross-validation rules prevent specific combinations of segment values in account combinations. You can use the Manage Cross-Validation Rules task to edit existing rules or create one-off rules.



Scenario

Your organization has a cross-validation rule called Companies 131 and 151, which restricts account combinations for those companies to department 40 and product 211. Account combinations for both companies should now include department 30. To edit the cross-validation rule, perform these steps.

- 1. Navigate to the Setup and Maintenance work area. Search for and select the Manage Cross-Validation Rules task.
- 2. Select the chart of accounts for your organization and select the **Companies 131 and 151** cross-validation rule.
- 3. Click the Validation Filter icon.
- 4. Click Add Fields and select the **Department** segment.
- 5. Accept the default operator, which is Equals, and select department 30.
- 6. Click OK.
- 7. Click Save.
- 8. To update the error message, search for and select the Manage Messages for General Ledger task. Query the error message name for the cross-validation rule and edit the message to include department 30.

Enabling Key Flexfield Segments for Business Intelligence: Points to Consider

A key flexfield registered in the database as enabled for Oracle Business Intelligence (BI) includes a BI Enabled setting for each of its segment instances. When a segment instance is BI-enabled, it's available for use in Oracle Business Intelligence.

The following aspects are important in understanding BI-enabled key flexfield segments.

- Flattening business components to use BI-enabled segments in Oracle BI
- Equalizing segments to prevent duplication and complexity in the flattened component
- Mapping attributes of flattened business components to logical objects in Oracle BI
- Managing the labels that map segments to logical objects in Oracle BI

After you deploy a business intelligence-enabled flexfield, use the Import Oracle Fusion Data Extensions for Transactional Business Intelligence process to import the flexfield changes into the Oracle Business Intelligence repository. Users can make use of the newly-generated attributes in business intelligence applications. For additional information about logical objects and import, refer to the Oracle Transactional Business Intelligence Administrator's Guide.

Flattening

When you deploy a business intelligence-enabled key flexfield, the deployment process generates an additional set of flattened business components for use in business intelligence. The flattened business components include attributes for business intelligence-enabled segment instances only.

If you assigned a label to a segment, the flattened components include a single attribute representing all segment instances with that label. If you didn't assign a label, the flattened components include a discrete attribute for each BI-enabled segment instance in each structure.

Mapping to Logical Objects in Business Intelligence

You can simplify reporting by representing similar segments as a single logical object in Business Intelligence. If you assign a label to segments that serve the same purpose in different structures, you can consolidate the segments into a single attribute. This prevents duplication and the extra workload and complexity that result from the flattening process. For example, an organization may have more than one definition of its key accounting flexfield to support different requirements for accounting reporting. A US Accounting Flexfield structure may have a segment called Subaccount to track project



expenditures. The same type of information may be tracked in a UK accounting flexfield structure with a segment called Project. Equalize these two segments to create a single list of values for reporting.

Non-labeled segments aren't equalized across context values, so the flattened components include a separate attribute for each segment for each structure. It may not be possible to equalize similarly labeled segments if they have incompatible data types or value set types.

Assign a label to a segment to map the corresponding attribute in the flattened components to a logical object in Oracle Business Intelligence. Using labels to map segments to BI logical objects minimizes the steps for importing the flexfield into Oracle Business Intelligence. Assigning a label to a segment serves to equalize the attribute across structures, as well as map the equalized attribute to business intelligence.

Managing Labels

You may assign a predefined label (if available) to segments or create labels for assignment, as needed. Specify a code, name, and description to identify each label. In the BI Object Name field, enter the name of the logical object in Oracle Business Intelligence to which the segment label should map during import. Specifying the BI logical object minimizes the steps for importing the flexfield into Oracle Business Intelligence and helps to equalize context-sensitive segments across structures.

If no labels are assigned to a BI-enabled segment, or the BI Object Name on the assigned label doesn't exist in business intelligence, you must manually map the segment to the required logical object when importing into Oracle Business Intelligence. In addition, segments without labels cannot be equalized across structures. The flattened components include a separate attribute for each non-labeled segment in each structure.

Importing to Oracle Business Intelligence Repository

After you deploy a business intelligence-enabled flexfield, import the flexfield changes into the Oracle Business Intelligence repository to make use of the newly flattened business components in business intelligence. Then propagate the flexfield object changes. When you import the metadata into the Oracle Business Intelligence repository, you must do so as the FUSION_APPS_BI_APPID user.

To import flexfield changes into the Oracle Business Intelligence repository in Oracle Cloud implementations, run the Import Oracle Fusion Data Extensions for Transactional Business Intelligence process. For additional information about import, refer to the Oracle Transactional Business Intelligence Administrator's Guide.

Note: When you import a flexfield into the Oracle Business Intelligence repository, you see both <name>_ and <name>_c attributes for each segment, along with some other optional attributes. The <name>_ attribute contains the value. The <name>_c attribute contains the code of the value set that the value comes from, and is used for linking to the value dimension. You must import both attributes.

Key Flexfields: Example

A key flexfield can capture expense account information.

Scenario

When entering details for each expense, the user specifies an account to which the expense is charged.



Entering Expense Accounts

A user interface for entering expenses gives the user the option of selecting an expense account that identifies the cost center and other details needed for processing the expense.

Analysis

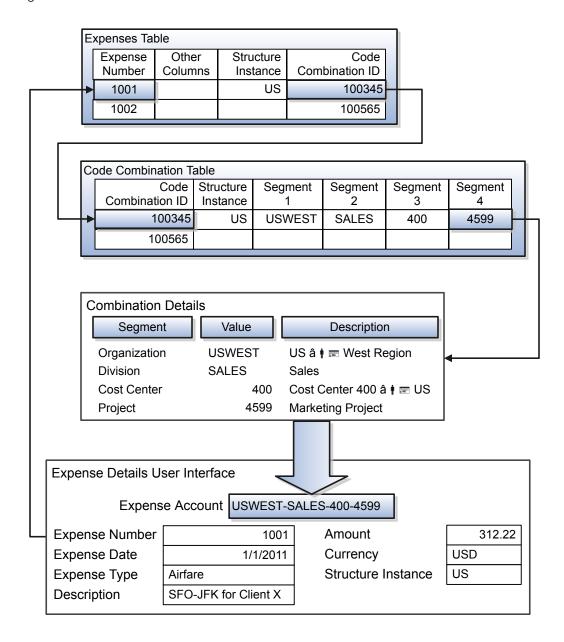
The expense account field is a foreign key reference to a code combination (EXPENSE_LINES.EXPENSE_ACCOUNT = ACCOUNTS.CCID).

Code Combinations Table for Entering Accounts and Employees

The code combinations table supports entering account information, such as for expense accounts.



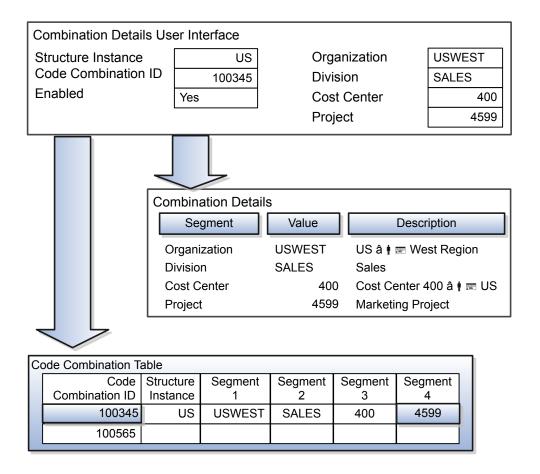
The figure shows the origin in the code combinations table of the account specified by the user. The code combination ID record stores the information of the key flexfield segments used to assemble the expense account based on the key flexfield configuration.



The combinations page, which is the maintenance page for the key flexfield, is for managing rows in the combinations table. In this example, managing the combinations means adding or editing account numbers that adhere to the key flexfield metadata rules.

The figure shows the code combination details for the example expense account reflected in the flexfield configuration and the code combinations table.





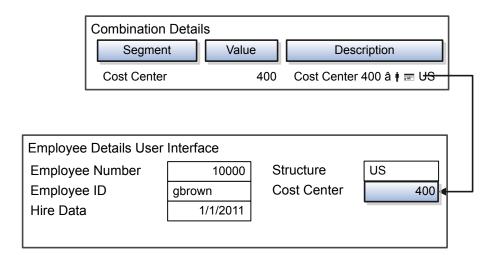
If dynamic combination creation isn't enabled, then when entering an expense line, the user can only select an account that already exists in the ACCOUNTS (combinations) table. If they require an account that doesn't exist, they must consult with the appropriate application administrator who can add the account to the combinations table.

If dynamic combination creation is enabled, then when entering an expense line, the user can either select a pre-existing account, or type in a new account that is created dynamically on the fly in the ACCOUNTS (combinations) table. Once the new combination is created, the same user can refer to it on the expense line.

When managing employee information, the user specifies the cost center that the employee belongs to. The cost center field corresponds to a single, labeled segment of the Account Key Flexfield and has metadata defined such as the allowable value set for that segment.

In this figure, instead of specifying a cost center ID reference to an account, only the Cost Center segment is used and the value is stored directly on the employee table.





Related Topics

• Creating One Chart of Accounts Structure with Many Instances: Example





20 Workforce Records

Define Workforce Records: Overview

In the Setup and Maintenance work area, most of the setup tasks for workforce details are in the Workforce Information functional area. If you create an implementation project, these tasks are in the Define Workforce Records task list. You define a person's name format, name style, availability, employment values, document types and checklists as a part of the Workforce Information functional area.

You define other workforce related tasks such as person number generation methods using the Manage Enterprise HCM Information task.

The Workforce Information functional area and the Define Workforce Records task list cover tasks in the following areas:

Area	Includes
Availability	Calendar events, work schedules and assignment, work shifts and workday patterns
Person Record Values	Person lookups, flexfields, profile options, person name formats and style, and person types
Employment Record Values	Employment lookups, flexfields, profile options, and assignment statuses
Documents	Document lookups, flexfields, and document types
Checklists	Flexfields, lookups, templates, and actions
Processes for Portrait Gallery	Settings and messages for portraits

Related Topics

Person Number Generation Methods: Explained

Define Availability

Worker Availability: How It Is Determined

The availability of a worker during a selected time period is automatically determined using:

- · Absence entries during that period
- The work schedule that the worker presently follows
- Calendar events

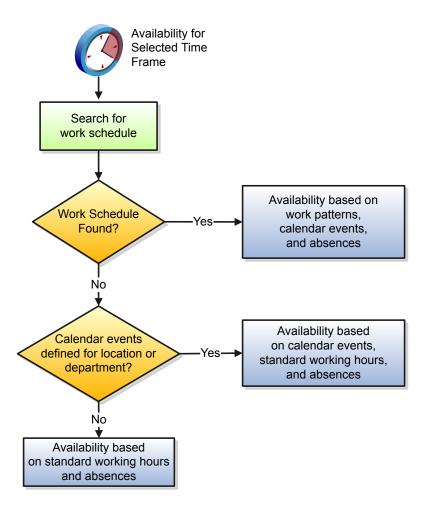


Settings That Affect Worker Availability

You specify which work schedules assigned to the worker's primary assignment or workforce structures are primary.

How Worker Availability Is Determined

The following figure shows how worker availability is determined.



The application searches for primary work schedules that were assigned to these workforce structure levels in the following order:

- 1. Primary assignment of the worker
- 2. Position
- 3. Job
- 4. Department
- 5. Location
- 6. Legal Employer
- 7. Enterprise

If there is no primary schedule assigned to any of the workforce structures, then the worker availability is determined by:

Absences



- Calendar events, if created for the worker's location or department
- Standard working hours defined for the worker's primary assignment

If there are no calendar events created, then the application determines availability based on standard working hours and absences.

To determine availability, work schedules assigned to lower workforce structure levels take precedence over those defined at higher levels.

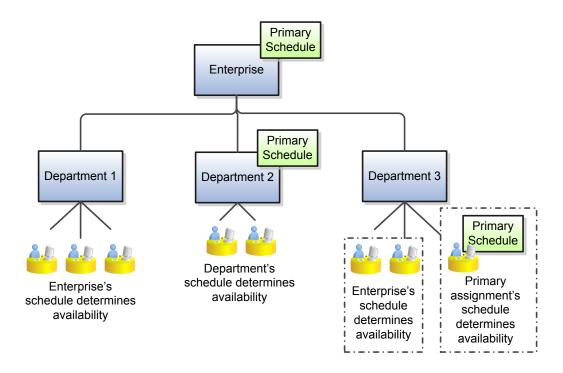
Scenario 1: You assigned a primary schedule at the enterprise level. However, since workers belonging to a particular department in that enterprise follow different work timings, you assigned a different primary schedule to that department.

Results: The department's primary schedule determines worker availability because that schedule takes precedence over the schedule defined at the enterprise level.

Scenario 2: In the same example, you assigned a primary schedule to a worker (primary assignment) belonging to the same department.

Results: That schedule determines the worker's availability because a schedule assigned to the primary assignment takes precedence over the ones defined at the department level and the enterprise level.

The following diagram illustrates this example:



The work patterns and exceptions that exist in the primary work schedule, and any absence entries during the selected time period, impact worker availability.



Calendar Event Coverage Type: Critical Choices

When you create a calendar event, you determine which set of workers the event must apply to. You must use one of these types of hierarchies to determine coverage:

- Organizational
- Geographic

You create calendar events using the Manage Calendar Events task in the Setup and Maintenance work area. You create the organizational or geographical hierarchies using the Manage Trees task in the Workforce Structures work area. For the hierarchy to be visible when you create a calendar event, you must ensure that the hierarchy is active.

Note: A calendar event, by default, applies to all workers belonging to the hierarchy nodes you included in the coverage. However, if you assign work schedules to workers, the calendar event only applies to them if you add the event as an exception in the work schedule.

Organization Hierarchy

Use an organizational hierarchy to apply a calendar event to your workers' assignments on the basis of the department that they belong to. For example, you want the Annual Sales Team Outing calendar event to apply to workers in the Sales department and its subordinate nodes, but not the Research department.

Geographic Hierarchy

Use a geographic hierarchy to apply a calendar event to your workers' assignments on the basis of the country, or state they belong to. For example, in the UK you may want to identify 2nd January as a holiday in Scotland but not in England, Wales, or Northern Ireland.

Related Topics

• Exceptions in Work Schedules: Points to Consider

Defining Calendar Event Coverage: Examples

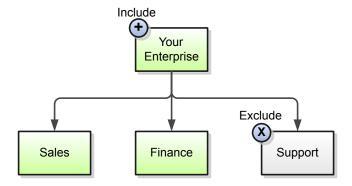
When you use a geographic or organizational hierarchy for calendar event coverage, you can select which nodes in the hierarchy to include in or exclude from the coverage. You can also override the calendar event name or its category for a specific node in the hierarchy. You create calendar events using the Manage Calendar Events task in the Setup and Maintenance work area.

Adding and Removing Coverage in a Hierarchy

You want to apply the New Phone System Training calendar event to all workers in your enterprise except those working in the Support department. When an event applies to most of a hierarchy, it's efficient to use the Include tool to include the whole hierarchy in the coverage and then use the Exclude tool to leave out the exceptions.



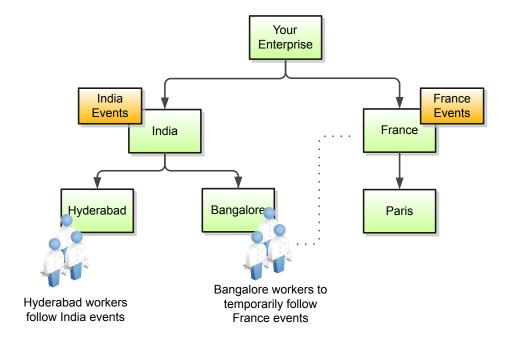
The following diagram shows how to include and exclude calendar event coverage in a sample organization hierarchy.



Overriding Coverage for Specific Locations

You have set up public holidays and other calendar events for workers at your India location and France location using a geographic hierarchy. For six months, workers at your Bangalore location work closely with their counterparts in Paris on a critical project. During this time, you want the Bangalore workers to follow the events you set for France. On the Manage Locations page, edit the location information for Bangalore and set the geographic hierarchy to France.

The following diagram shows a sample geographical hierarchy where employees of a particular location share calendar events of another country.



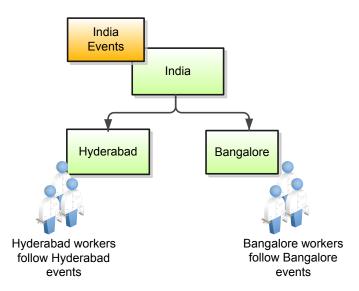
Overriding Coverage for Specific Geographic Levels

You have set up public holidays and other calendar events for workers at your India location using a geographic hierarchy. However, you now want to set up exclusive regional holiday events for Bangalore and Hyderabad. On the Manage Locations



page, edit the location information for the user and set the geographic hierarchy to Hyderabad or Bangalore based on the user's location. You now associate the user with calendar events defined exclusive for Hyderabad or Bangalore based on the user's location.

The following diagram shows a sample geographical hierarchy where employees of a particular location share calendar events defined for their state or city.



Overriding Coverage for Specific Employees

Some workers from your Hyderabad location are closely working on a project with their counterparts at your France location for a year. For that duration, you want to change coverage for these employees so that they follow the calendar events you set up for the France location. For each worker, open the Manage Employment page, and set the Geographic Hierarchy to France.

Overriding the Calendar Event Name in a Hierarchy

You have set up the May Day calendar event for all locations in your enterprise. However, you want the event to be referred to as Labor Day for your France location. On the Calendar Event page, select the France location node on your geographical hierarchy and use the Override tool to enter a new name for the event.

Overriding the Calendar Event Category in a Hierarchy

You have associated the Good Friday calendar event with the Public Holiday event category and applied the coverage to all departments in your enterprise. However, you want to change the event category to a voluntary holiday instead of a public holiday for your Finance department. On your organization hierarchy, select the Finance node and use the Override tool to select a different category.



Setting Up a Geographic Tree and creating a Calendar Event: Worked Example

This example demonstrates how to create a geography tree so that you can associate calendar events with employees on the basis of their country, state or city.

The following table summarizes key decisions for this scenario.

In This Example
US United States, GB United Kingdom, and IN India.
Country nodes: India, US and UK
State nodes: Andhra Pradesh, Karnataka, California, England, Scotland, Wales, respectively
City nodes: Hyderabad, Bangalore, San Mateo, respectively.
May Day for Hyderabad
Thanksgiving Day for San Mateo
Boxing Day for England

Task Summary

The following is a summary of tasks that you must perform.

- 1. Define the country, state and city level nodes in the Geographic Tree Nodes Lookup.
 - Note: You define this lookup only when you want to define Calendar Events for states and cities.
- 2. Create a geography tree based on the HCM Geography Tree Structure, a predefined tree structure and add a tree version.
- **3.** Add geographic tree nodes.
- 4. Audit, activate and row-flatten the tree version.
- 5. Define calendar events for the country, state, and city level nodes.
- **6.** Define geography hierarchy overriding for the location.
- 7. View the defined calendar events for the user.

Defining the Nodes in the Geographic Tree Nodes Lookup

You manage calendar event lookups using the Manage Common Lookups task in the Setup and Maintenance work area. To add a node for defining calendar events for a country, state or a city, you must first define the nodes in the ORA PER GEOGRAPHIC TREE NODES lookup.

To add the nodes, you perform the following steps:

Select Navigator - Tools - Setup and Maintenance to open the Setup and Maintenance work area.



- 2. On the Search Tasks area, search for the Manage Common Lookups task.
- 3. On the All Tasks section, select Manage Common Lookups and click Go to Task.
- 4. In the Lookup Codes window, search for and select the ORA_PER_GEOGRAPHIC_TREE_NODES lookup.
- 5. To add the nodes, enter the following details as shown in the table below:

Field	Value
Lookup Code	You specify the short code for the country, state or city you want to define. For example:
	。 GL for Global
	。 US_CA for California, US
	CA_SM for San Mateo, California
	Note: You must choose a unique name for each code. For example, you may want to name CA for California, but CA also symbolizes Canada. Therefore, you may want to create a unique code corresponding to each country, state or city to avoid ambiguity.
Meaning	Specify the name of the country, state or city for the defined codes. For example:
	。 Global
	。 California
	。 San Mateo

6. Click Save.

The nodes display in the Lookup Code window.

Creating a Geographic Tree and Adding a Tree Version

- 1. Select Navigator Tools Setup and Maintenance to open the Setup and Maintenance work area.
- 2. On the All Tasks tab, search for and select the Manage Geography Trees task.
- 3. On the Manage Trees and Tree Versions page, select Create Tree from the actions menu.
- 4. On the Create Tree: Specify Definition page, complete the fields as shown in this table.

Field	Value
Name	Enterprise Locations
Code	ENT_LOC

- 5. Click Next. Click Next again.
- 6. Click **Submit**. The newly created tree displays in the Search Results section.

To create a Geographic Tree Version:

a. In the Search Results section of the Manage Trees and Tree Versions page, select the tree that you just created.



- **b.** Select **Actions Create Tree Version**.
- c. On the Create Tree Version: Specify Definition page, complete the fields as shown in this table.

Field	Value
Name	Enterprise Locations Version 1
Effective Start Date	January 1, 2011

- d. Click Next.
- e. On the Edit Tree Version: Specify Nodes page, you can specify the nodes.
- f. Click Create.

Adding Geography Tree Nodes

- 1. In the Add Tree Node dialog, select **Geographic Tree Calendar Top Scopes Data Source** in the data source field.
- 2. Select **Global** from the Available Nodes region and move it to the Selected Nodes region. You select Global because the topmost node in a geographic tree must be the root node.
- 3. Click OK.
- 4. On the Edit Tree Version: Specify Nodes page, select **Global**.
- 5. Click Create.
- 6. In the Add Tree Node dialog, select Geographic Tree Territory Code Data Source in the Data Source field.
- 7. Select the following country level nodes from the Available Nodes region and move it to the Selected Nodes region:
 - GB United Kingdom
 - IN India
 - US United States
- 8. Click OK
- 9. In the Edit Tree Version: Specify Nodes page, select a country node. For example, GB United Kingdom.
- 10. Click Create.
- 11. In the Add Tree Node dialog, select **Geographic Tree Calendar Events Data Source** in the data field. This enables you to define state and city level nodes.
- 12. Select England from the Available Nodes region and move it to the Selected Nodes region.
- 13. Click OK.
- 14. On the Edit Tree Version: Specify Nodes page, select England.
- 15. Click Create.
- 16. In the Add Tree Node dialog, select **Geographic Tree Calendar Events Data Source** in the data field.
- 17. Select London from the Available Nodes region and move it to the Selected Nodes region.
- **18.** Click **OK**.
- 19. Click **Submit**. The confirmation window displays. Click **OK**.

You created a geographic hierarchy tree for Global - United Kingdom - England - London.

Likewise, you may create country - state - level nodes for India and United States such as:

- o India Andhra Pradesh Hyderabad
- o India Karnataka Bangalore
- o United States California San Mateo



Auditing, Activating and Row-Flattening the Geographic Tree Version

- 1. On the Manage Trees and Tree Versions page, select the tree version that you created.
- 2. Select Actions Audit.
- 3. On the Trees Audit Result page, click Online Audit.
- 4. Click Done.
- 5. In the Search Results section of the Manage Trees and Tree Versions page, select the tree version that you created.
- 6. Select Actions Set Status Active.

Row-flattening the Tree Version:

You row flatten a tree so that retrieval and display of the tree is faster.

- a. In the Manage Trees and Tree Versions page, select Actions Flatten Row Flattening.
- **b.** On the Row Flattening page, click **Online Flattening**.
- c. Click **OK**. The confirmation dialog displays. Click **OK**.
- d. Click Done.

Defining a Calendar Event

- 1. Select Navigator Tools Setup and Maintenance to open the Setup and Maintenance work area.
- 2. On the All Tasks tab, search for and select the Manage Calendar Events task.
- 3. Click Go to Task.
- **4.** On the Manage Calendar Events page, click **Create**.
- 5. On the Create Calendar Event page, complete the fields as shown in this table.

Field	Value
Name	May Day
Short Code	MD_HYD
Category	Public Holiday
Start Date	5/1/14 12:00 AM
End Date	5/1/14 11:59 PM

6. In the Coverage section, complete the following fields:

Field	Value
Hierarchy Type	Geographic
Hierarchy	Enterprise Locations.
	This refers to the tree that you defined in the Manage Geography Trees page. The newly created nodes appear in the Coverage Source section.



- 7. In the nodes area, navigate to India Andhra Pradesh Hyderabad
- 8. Select Hyderabad.
- 9. Select Actions Include.
- 10. Click **Submit** and then **OK**.
- 11. Click Done.

The Calendar event **May Day** for Hyderabad is created. Likewise, you may repeat steps 3-9 for creating other events such as:

- Thanksgiving day for San Mateo
- Boxing day for England

Defining Geography Hierarchy Overriding

Now that you have successfully created Calendar events, you must define the Geographic Hierarchy overriding for the user's location.

- 1. Select Navigator Tools Setup and Maintenance to open the Setup and Maintenance work area.
- 2. On the All Tasks tab, search for and select the Manage Locations task.
- 3. Click Go to Task.
- On the Manage Locations page Search section, enter the name of the user's location in the Name field. For example, ZTM-LOC006-Hyderabad - ZTM-LOC006.
- 5. Click **Search**. The search results display.
- 6. In the Results in Table section, select **ZTM-LOC006-Hyderabad**.
- 7. On the Location page, click **Edit** then **Update**.
- 8. Click OK.
- 9. On the Edit Location page, click **Geographic Hierarchy**. The newly defined list of nodes display.
- 10. Select Hyderabad.
- 11. Click Save and then OK.
- 12. Click **Submit**. The warning dialog displays.
- **13.** Click **Yes**. You are redirected to the Manage Locations page.
- 14. Click Done.

Likewise, you may define geography hierarchy overriding for England and San Mateo to associate calendar events of these locations to the users.

Viewing the Defined Calendar Events

- 1. Select **Navigator About Me Time** to launch the calendar.
- 2. On the calendar, you can view the event May Day.

Related Topics

- Managing Tree Structures: Points to Consider
- Specifying Performance Options for a Tree Structure: Points to Consider

Work Schedule Types: Explained

You define availability details for a period of time using work schedule types. You can create three types of work schedules using the Manage Work Schedules task in the Setup and Maintenance work area.

Time



- Duration
- Elapsed

Time Work Schedule

A time-based work schedule has a fixed work day pattern. For example, you define an eight-hour schedule, five days a week. You can create a time-based work schedule that starts at 8:00 a.m. and ends at 5:00 p.m. A worker assigned to a time based work schedule is considered to be available for a fixed number of hours each day.

Duration Work Schedule

A duration work schedule considers only the duration of working hours but doesn't specify any definite time period. For example, you can create a work schedule with duration of 8 hours without specifying the start time and end time of the duration. In this work schedule, a worker is considered to be available for eight hours each day.

Elapsed Work Schedule

In an elapsed work schedule, workers don't have a fixed start or end time. For example, some workers may start work at 9.00 a.m., and some at 11.00 a.m. A worker assigned to an elapsed work schedule is considered to be available for a numbers of hours in a day.

Creating and Assigning a Work Schedule: Worked Example

This example demonstrates how to create and assign a work schedule, incorporating shifts, patterns, and calendar events. The work schedule is for a support department in India, working in two shifts, and eligible for all public holidays.

The following table summarizes key decisions in this scenario:

Decisions to Consider	In This Example
Which calendar events must be included in the work schedule?	All public holidays
Which geographical location must the calendar events apply to?	India
What shifts must workers follow?	Day shift (9 a.m. to 5 p.m.). Night shift (5 p.m. to 1 a.m.).
What is the work pattern that workers must follow?	Day shift from Monday to Wednesday. Night shift on Thursday and Friday. Weekly holiday on Saturday and Sunday.
When must the work schedule start and end?	Starts on 1 January, 2011. Ends on 31 December, 2011.
Which shift must workers work first when the work schedule starts?	Day shift
What eligibility criteria must you associate the work schedule with so that line managers can easily find the schedule to assign to workers?	All employees from the support department



Decisions to Consider	In This Example
Which department must this schedule be assigned to?	Support department
What exceptions must be made to the work schedule of Vijay Singh who works in the same department?	Vijay Singh is scheduled to attend the Advanced Communication Skills training course on 8 February, 2011 during which time, the work schedule must indicate that he is unavailable.

Create calendar events within the Public Holiday category. Create two shifts (day and night), then create a weekly work pattern that uses these shifts. Create a work schedule using this work pattern, and select the Public Holiday calendar event category as an exception. Then assign this work schedule to the support department. Assign the same schedule to Vijay Singh and add the training course as an exception and indicate that the worker is unavailable during the course.

Prerequisites

- 1. On the Manage Trees page, ensure that the geographic hierarchy that you created for your enterprise contains a country node for India.
- 2. Create an eligibility profile Support_Workers for all workers in your Support department.

Creating Calendar Events

- 1. On the Manage Calendar Events page, click Create.
- 2. On the Create Calendar Event page, complete the fields, as shown in this table:

Field	Value
Name	Enter the name of the public holiday.
Category	Public Holiday
Start Date	Enter the date when the public holiday starts.
End Date	Enter the date when the public holiday ends.
Short Code	Enter a code to identify the public holiday.
Hierarchy Type	Geographic
Hierarchy	Select the geographic hierarchy that you created for your enterprise.

- 3. In the Coverage region that displays the geographic hierarchy you selected, select the India node, and click **Include**.
- 4. Click Submit.
- 5. If you want to add another calendar event, repeat steps 2 through 5.

Creating Shifts

- 1. On the Manage Work Shifts page, click Create Time Shift from the Actions menu.
- 2. In the Create Time Shift window, complete the fields for each shift, as shown in this table:



Field	Day Shift	Night Shift
Name	Day Shift	Night Shift
Start Time	0900 hrs	1700 hrs
Duration	8 hours	8 hours
Shift Detail Type	None	None

3. Click Save and Close.

Creating a Workday Pattern

- 1. On the Manage Work Workday Patterns page, click Create Time Workday Pattern from the Actions menu.
- 2. In the Create Workday Pattern window, complete the fields, as shown in this table:

Field	Value
Name	Weekly Work Pattern
Length in Days	7

- 3. In the Workday Pattern Details region, click **Add Row** from the **Actions** menu.
- 4. In the Workday Pattern Details table, complete the fields, as shown in this table:

Field	Day Shift	Night Shift
Start Day	1 (Monday)	4 (Thursday)
End Day	3 (Wednesday)	5 (Friday)

5. Click Save and Close.

Creating a Work Schedule

- 1. Navigate to the Manage Work Schedules page.
- 2. On the Manage Work Schedules page, click **Create**.
- 3. On the Create Work Schedule page, complete the fields, as shown in this table:

Field	Value
Name	Work Schedule for Support
Category	Work
Туре	Time



Field	Value
Effective From Date	01 January, 2011
Effective To Date	31 December, 2011
Pattern	Weekly Work Pattern
Exceptions	Public Holiday event category
Eligibility Profile	Support_ Workers

4. Click Submit.

Assigning the Work Schedule to a Department

- 1. Navigate to the Manage Work Schedule Assignment Administration page.
- 2. Search for the Work Schedule for Support schedule.
- 3. Click the schedule to open it on the Edit Work Schedule Assignment page.
- 4. On the Resource Assignments region, click **Add Row** from the **Actions** menu.
- **5.** Complete the fields, as shown in this table:

Field	Value
Resource Type	Department
Name	Support department
Start Date	01 January, 2011
End Date	31 December, 2011
Starting Shift	Day Shift
Primary	Yes

6. Click Submit.

Modifying the Work Schedule of a Worker

- 1. On the Person Search page, search for Vijay Singh, and select that record.
- 2. From the Actions menu, click Manage Work Schedule Assignment.
- 3. On the Manage Work Schedules page, click the Add Row icon on the tool bar.
- 4. Complete the fields in the Schedules region, as shown in this table:

Field	Value
Name	Select Work Schedule for Support.



Field	Value
	In this example, when you search for the schedule in the Search and Select window, select the Filter Using Eligibility check box to display all work schedules created for the Support department.
Start Date	01 January, 2011
End Date	31 December, 2011
Starting Shift	Day Shift
Primary	Yes

- 5. In the Exceptions region, click the Add Row icon on the tool bar.
- **6.** Complete the fields, as shown in this table:

Field	Value
Туре	Resource Exception
Name	Click Create in the choice list to create a resource exception called Advanced Communication Skills that starts on 8 February, 2011 and ends on the same day.
Availability	Off Period

7. Click Submit.

FAQs for Define Availability

How do I create a calendar event category?

In addition to the predefined Public Holiday event category, you can create your own calendar event categories by adding values to the Calendar Event Category lookup type. You manage calendar event lookups using the Manage Availability Lookups task in the Setup and Maintenance work area.

When do calendar events affect workers?

When you include that event as an exception in a work schedule and assign it as a primary work schedule to the worker's assignment. However, if no work schedule exists for the worker's assignments, then the calendar events that cover the worker's location or department apply.

How do I change exceptions in work schedules for individual workers?

When you assign the schedule to a worker using the Manage Work Schedule Assignment page, you can change the exceptions and their impact to that worker's availability. For example, if you added a calendar event as an exception that impacts all workers, but want a particular worker to remain available to handle critical customer queries, you can change the availability for that exception.



How can I associate calendar events with countries?

On the Manage Trees page, you must create a geographic tree version using the predefined HCM Geographic Hierarchy tree structure and add country nodes. When you create a calendar event, select that geographic tree version and select countries that you want the calendar event to apply to.

You can also define calendar events for nodes below country level such as states, cities or cantons. For example, in the UK you may want to declare a holiday in Scotland, but not in England, Wales or Northern Ireland.

Define Person Record Values

Person Types: Explained

You use person types to identify different groups of people in your enterprise.

For example, for purposes of reporting, you may want to identify the following:

- Contractual workers in your enterprise with the Contingent Worker person type.
- Regular employees with the Employee person type.

On the basis of the person type, you can:

- Maintain information for a group of people
- Secure access to information

System Person Types

These are predefined person types that the application uses to identify a group of people. You can't change, delete, or create additional system person types.

User Person Types

Each system person type contains a user person type that you can configure to your requirements. You can change, remove, or create additional user person types to suit your enterprise requirements. For example:

- If your enterprise refers to its employees as associates instead of employees, you change the Employee user person type to Associate.
- If you want to classify employees further as equity partners, non-equity partners, and associates, you add these user
 person types under the Employee system person type. There is no limit to the number of user person types that you
 can add to a system person type.



Person Names: Explained

This topic describes name styles, name formats, and person-name languages.

Name Styles

The structure of a person's name can vary among countries. Therefore, a predefined name style exists for many countries for capturing relevant components of a person's name. The name style determines:

- Which name components appear when you create a person record.
 For example, one country may display first name, last name, and title while another displays first name, middle name, and last name.
- The order in which the name components appear.
- Which name components are required and which are optional.
 For example, in one country you may be required to enter a title while in another, the title may be optional.

When a country-specific name style doesn't exist, a universal name style (last name, first name, title, and middle names) is used.

When you create a person record you select a legal employer, which sets the legislative context for the record. For example, if the legal employer is a Canadian legal entity, the legislative context is Canada and the Canadian name style is used. A person's contacts have the same name style as the person for whom they are contacts.

Name Formats

A name format is a template for arranging the following components in a specified folder:

- First name
- Last name
- Title

Four name formats are available, namely:

- Display name
- List name
- Full name
- Order name

Name formats can vary among countries; therefore, both global and local versions of names formats can exist.

When a person's name is displayed to the users, the format of the name can vary according to the context in which it appears. For example, in an ordered list of names, last name may appear before first name, but in other contexts first name appears before last name.

Global and Local Name Formats

The profile option HR: Local or Global Name Format controls whether users see local names or global names by default.

Global names use one name format; therefore, users in multinational enterprises can see person names presented consistently, regardless of their countries of origin.



Users who view or manage person records in a single country may prefer to see local names. For example, users who view or manage person records only in Japan may prefer to see Japanese rather than global formats of person names.

Person-Name Languages

Each enterprise identifies a global-name language. Person names appear in this language by default. When you create a person record, you can enter a local name in a different language from the global-name language. Names appear in this language for users whose HR: Local or Global Name Format profile option value matches the local-name language.

For example:

- The global-name language for the enterprise is American English.
- You set the local-name language in a person record to Japanese. Henceforth, users whose HR: Local or Global Name Format profile option is set to Japanese see the person's name in Japanese.
- All other users (those who are viewing global-format names or whose HR: Local or Global Name Format profile option is set to a value other than Japanese) see the person's name in American English.
- Note: If you enter no local name in a person record, the local name is the same as the global name by default.

Users can set preferences to select the language in which they see the display-name versions of person names.

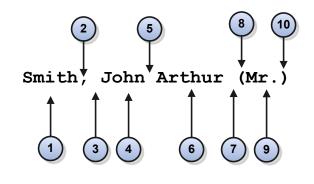
Person Name Formats: Explained

A person name format type determines how a person's name appears across Applications.

- Each person name format type contains a sequence of name components that represents different parts of a person's name, for example, first name, last name, and punctuation marks.
- You can change the sequence of, remove, or include additional name components according to your requirements.



The following figure displays a sample name format, including the components and punctuation marks.



- 1 Last name
- 6 Middle name
- (2) Comma
- 7 Space
- 3 Space
- 8 Opening bracket
- 4 First name
- 9 Title
- 5 Space
- 10 Closing bracket

Predefined Name Format Types

Oracle Fusion HCM provides the following predefined format types.

Format Type	Usage	Default Structure
Full Name	Names that appear in reports.	[Last Name], [First Name] [Middle Name] [Title]
Display Name	Names that appear singly, for example, on the Person Management page header.	[First Name] [Prefix] [Last Name]
List Name	Names that appear in lists	[Prefix] [Last Name], [First Name]
Order Name	Names that appear in name-ordered lists where the full name alone isn't sufficient to sort the list.	[Last Name] [First Name]

Note: When you create or edit format types, to avoid creating blank person names, ensure that you include at least one name component that is never blank.



Local and Global Name Formats

Oracle Fusion HCM includes local and global formats for each format type.

When you create a new format on the basis of an existing format type, you identify it as either local or global. For local format types, you must also select the legislation that the format type applies to

- A local format is suitable for users in a single legislation who prefer to see person names in a character set appropriate to their legislation.
- A global format is suitable for users in a multinational enterprise who prefer to see person names in a single (typically, Western) character set, so that all names, regardless of origin, have the same representation.

Managing Person Work Phones: Explained

A person can have one primary phone. A virtual private database (VPD) policy controls the display of phone numbers. It ensures that nonwork phone numbers are displayed only to people with the appropriate privileges. This policy is delivered by Oracle and cannot be modified.

Access Security and Privileges

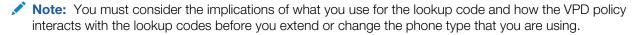
You can view a person's phones, including nonwork numbers, if you have a role that provides one of the following data security privileges:

- Manage person phones data
- View person phones data
- Report person phones data

Typically, workers can view their own phone details. They can also view phone details of other workers if the phones are defined and work related and selected as primary. If a worker has a nonwork phone type selected as primary, then other workers viewing their coworkers' phones can't see the primary phone.

Work Phones Lookup Codes

Predefined phone types that have a lookup code that begin with W are considered public. If you create a new lookup code that starts with W, it's considered as public and can be viewed by everyone. If the lookup code does not start with W, the phone type is considered as sensitive. Only those roles that have the requisite privileges can view nonwork phone details.



The following table lists the predefined phone lookup codes that begin with W codes and their meaning.

Lookup Code	Meaning
W1	Work Phone
W2	Second Work Phone
W3	Third Work Phone



Lookup Code	Meaning
WF	Work Fax
WM	Work Mobile Phone

Managing Person Name Styles: Explained

Person name styles define the person name components for a country. Only one style can exist for a country, while you can predefine name styles for some countries.

Note the following:

- You can create name styles for countries that have none.
- You can copy an existing style to use as the basis.
- You can create a new name style in case of specific requirements for a country

For countries that do not have a predefined person name style, the universal name style applies by default.

You can edit predefined name styles by doing the following:

- creating additional components
- selecting mandatory components
- changing order of components
- selecting list of values for the components

You cannot delete predefined components and make mandatory components optional. You can delete only those components that were added to a predefined name style. You cannot delete a predefined name style.

Note: You can create, edit, and delete custom name style and its components any time. If a custom name style is deleted after person names have been created using that style, the universal name style applies by default.

Person Name Components

Last Name is a mandatory name component for all person name styles. You can set other person name components as mandatory, based on specific requirements for a country.

Note the following:

- The name components Name Information 1 through Name Information 14 are reserved for localization requirements.
- You can use the components Name Information 15 through Name Information 30 to define specific person name components for a country.

For example, if you want to capture Mother's Maiden Name for a country, you can use the name component Name Information 15, and denote the display name for this component as Mother's Maiden Name.



Person Lookups: Explained

This topic identifies common lookups that are person-related and have user or extensible customization levels. Review these lookups, and update them as appropriate to suit enterprise requirements using the Manage Common Lookups task.

Person Information Lookups

Person information lookups are described in the following table:

Lookup Type	Description	Customization Level
ORA_ PER_ EXT_ IDENTIFIER_ TYPES	Type of a person's identifier in an external application, such as time device badge identifier, third-party payroll identifier, or third-party payroll alternate identifier	User
PER_ NATIONAL_ IDENTIFIER_ TYPE	Type of a person's national identifier, such as social security number, civil registration number, or national insurance number	User
PERSON_ TYPE_STATUS	Status of a user person type, such as active or inactive	User
EMAIL_TYPE	Type of a person's e-mail address, such as home e-mail or work e-mail	Extensible
	Note: A person can have only one work e-mail by default. If you want to add a secondary work e-mail, you must define another lookup type.	
ADDRESS_TYPE	Type of a person's address, such as home address or mailing address	Extensible
PHONE_TYPE	Type of a person's phone, such as home phone or mobile phone	Extensible
PER_CM_MTHD	Communication methods for a person, such as e-mail or instant messenger	Extensible
PER_ CONTACT_TIMES	Times of day when a specified phone number can be used, such as evenings or weekends	Extensible
PER_ETHNICITY	Person's ethnicity, such as Hispanic, Asian, or American Indian	User
PER_RELIGION	Person's religion, such as Christianity, Hinduism, or Islam	Extensible



Lookup Type	Description	Customization Level
PROFESSION	Person's profession reported on a visa or work permit, such as engineer, nurse, or teacher	Extensible
TITLE	Person's title, such as Miss, Doctor, or Professor, forming part of the person's name	Extensible
HONORS	Higher qualifications, such as CPA, PhD, or DDS, forming part of the person's name	Extensible
PER_ HIGHEST_ EDUCATION_ LEVEL	Person's highest level of academic qualification, such as BSc, Diploma, or MA.	User
MILITARY_RANK	Person's military rank, such as private, sergeant, or corporal, forming part of the person's name	Extensible
BLOOD TYPE	Person's blood group, such as A rhesus negative or B rhesus positive	User
CONTACT	Relationship between a person and the person's contact, such as partner, child, or brother	User
MAR_STATUS	Person's marital status, such as single, married, or legally separated	User

Document Information Lookups

Document information lookups are described in the following table.

Lookup Type	Description	Customization Level
PER_ DRIVERS_ LICENSE_TYPE	Type of a person's driver's license, such as permanent or temporary	Extensible
PER_ CITIZENSHIP_ STATUS	Status of a person's citizenship, such as active or expired	Extensible
PER_ PASSPORT_TYPE	Type of a person's passport, such as emergency or regular	Extensible
PER_ VISA_ PERMIT_TYPE	Type of a person's visa or work permit, such as temporary worker or residence permit	User
PER_ VISA_ PERMIT_STATUS	Status of a person's visa or work permit, such as pending or active	Extensible



Disability Information Lookups

Disability information lookups are described in the following table.

Lookup Type	Description	Customization Level
DISABILITY_ CATEGORY	Type of a person's disability, such as hearing loss or visual impairment	User
DISABILITY_ REASON	Causes of a person's disability, such as accident or illness	Extensible
DISABILITY_STATUS	Status of a person's disability registration, such as approved or pending	User
ORA_PER_SELF_DISCLOSE_DISABILITY	Type of self-disclosure responses for a disability based on the country selection.	User

Communicating Person and Assignment Changes to Consumer Applications: Explained

You may need to alert other Oracle Fusion applications when you make changes to person and assignment details to synchronize their information with Oracle Fusion Global Human Resources.

To share the changes made to person and assignment details with consumer applications, you must run the Synchronize Person Records process. The process generates an HCM event, ChangedPersonDetails, that consumer applications listen to. When you start the process, you can specify the start and end dates. The process generates events for the changes made between the start and end dates that you specified. If you specify no date, the process runs on the system date, and generates events for changes made on that date.

If you make changes to person records daily, it is recommended that you schedule Synchronize Person Records to run daily on the system date (without specifying start and end dates).

Note: In the Coexistence for HCM environment, you can run Synchronize Person Records after you upload person records to Oracle Fusion for the first time. When you run the process, specify the start date (start date of the oldest person record) and end date (system date). When you load person records subsequently, run Synchronize Person Records on the system date (without specifying start and end dates). Don't schedule the process to run daily.

Changes Notified to Consumer Applications

When you run Synchronize Person Records, the process generates the ChangedPersonDetails event when you make changes to the following person and assignment details:

- Person details:
 - Name
 - Work e-mail



- Phones
- Image
- Service dates
- Assignment details:
 - Job
 - Position
 - Department
 - Work location
 - Work location address
 - Manager
 - Work type
- Note: The ChangedPersonDetails event is not generated if you make changes to the following existing person details:
 - Job
 - Position
 - Department
 - Work location
 - Work location address

The Manager Hierarchy: How It's Maintained

In many situations, a person's manager hierarchy must be readily available. For example, a person's line manager may be required during an approval process, and business intelligence reports often retrieve data based on a manager hierarchy. This topic describes how the manager hierarchy is maintained.

How the Manager Hierarchy Is Maintained

A person's manager hierarchy could be derived from active data tables, but the impact of that approach on performance is unpredictable. Therefore, the complete manager hierarchy for each person is extracted from data tables and stored in a separate manager hierarchy table. This table is known as the denormalized manager hierarchy. The denormalized manager hierarchy ensures that a person's manager hierarchy is both easily accessible and up to date.

Whenever a change is made to a person's manager hierarchy through the application pages, the change is reflected automatically in the denormalized manager hierarchy table. You use the Refresh Manager Hierarchy process to populate the denormalized manager hierarchy table when person records are migrated from other applications.

You run the Refresh Manager Hierarchy process in the Scheduled Processes work area. To run the process, you must have the Human Resource Specialist job role. The process has no default schedule. You can run the process occasionally to perform a complete refresh of the denormalized manager hierarchy. Alternatively, you can specify a schedule to run the process at regular intervals. Refresh Manager Hierarchy processes all types of manager hierarchies.

In addition to performing full refreshes of the manager hierarchy, you can perform incremental refreshes. With this approach, you refresh the hierarchy based on manager changes occurring in the previous N days. Schedule a full refresh every month or quarter and an incremental refresh every day or week, for example.



FAQs for Define Person Record Values

What happens if I change the status of a user person type?

The status of a user person type determines whether it's available across Oracle Fusion HCM.

If you inactivate a user person type, there is no impact on worker assignments that are currently associated with that person type. However, starting from the date of inactivation, you can't select that person type to associate with worker assignments.

Note: You cannot inactivate a default user person type. You must first select a different user person type as the default.

What's the purpose of the default user person type?

Each system person type contains a default user person type that the application uses to associate with person records for reporting and display purposes.

When you hire a worker and specify assignment information, the application associates the default user person type with that worker assignment. However, if you select a different person type, then the application considers the selected person type as the default one for that worker.

When does the application update stored names with a person name format?

When you run the Update Person Names process in the Scheduled Processes work area. When you update a name format, you must run the process so that the application updates the stored names according to the updated format type rules. You can run the process for a specific name format and legislation combination.

How can I switch between local and global formats to display person names?

You use the HR: Local or Global Name Format profile option. If you select the global name format, then person names appear in the same format across all legislations. If you select a particular legislation, then person names appear in a format specific to that legislation.

For example, if you set the profile option to Japan, then Japanese person names appear in the local name format that was created for Japan. However, person names that were stored using formats other than those of the Japanese legislation appear according to the global name format.

What's the difference between person name formats and person name styles?

Person name formats determine the order of the person name components for a specific format type.

The sequence of components for predefined name format types can be configured for a country. For example: Display Name can be defined as First Name, Last Name, and List Name can be defined as Last Name, First Name.

Person name styles define the person name components that can be captured for a country; for example, first name, last name, title, previous last name, known as, and so on. Person name styles can be configured by selecting the required name components for a country.

What are the lookup types associated with person identifiers?

The ORA_PER_EXT_IDENTIFIER_TYPES lookup type provides the predefined identifier types. You can add more types such as a person's parking pass identifier by adding values to this lookup type. The predefined identifier types are Time Device Badge identifier, Third-Party Payroll identifier, and Third-Party Payroll Alternate identifier.



How can I enable the Employment Details tab in the Personal Information work area?

The tab isn't available out of the box. To enable the tab, you must create a sandbox and set the Visible property of the tab to Yes. To do this, select Tools > Structure from the Navigator menu, expand the About Me category, and click Personal Information. Then, set the property for the tab in the Tabs area.

Related Topics

Managing Categories and Page Entries for the Navigator and Springboard: Procedure

Define Employment Record Values

Assignment Statuses: How They are Set Up

Each assignment contains an assignment status. The assignment status contains an HR status, a payroll status, and optionally user statuses. The HR status and payroll status values are linked to the assignment status and are set automatically when the assignment status changes.

This table summarizes the values of the three statuses.

Assignment Status	HR Status	Payroll Status
Active - payroll eligible	Active	Process
Active - no payroll	Active	Do not process
Active - process when earning	Active	Process when earning
Active - process nonrecurring element entry	Active	Process nonrecurring element entry
Suspended - payroll eligible	Suspended	Process
Suspended - no payroll	Suspended	Do not process
Suspended - process when earning	Suspended	Process when earning
Suspended - process nonrecurring element entry	Suspended	Process nonrecurring element entry
Inactive - payroll eligible	Inactive	Process
Inactive - no payroll	Inactive	Do not process
Inactive - process when earning	Inactive	Process when earning



Assignment Status	HR Status	Payroll Status
Inactive - process nonrecurring element entry	Inactive	Process nonrecurring element entry

Assignment Status

When you create or edit an assignment, you select an action that categorizes the change and determines what are the next steps. Some actions make an automatic change to the assignment status. For example, when you create an assignment, its status is set automatically to Active - payroll eligible. The same action sets the HR status to Active and the payroll status to Process. Otherwise, you must set the assignment status directly.

Payroll Status

The payroll status Process When Earning indicates that payroll is processed only during payroll periods with earnings. The Process When Earning status typically is used in countries with cumulative tax rules, to stop tax refunds when payments are not issued. The status Process Nonrecurring Element Entry indicates that only the active element entry for the nonrecurring element is processed. The Process Nonrecurring Element Entry status typically is used for one-time payments for terminated employees.

User Status

You can define one or more user names for each assignment status value, using the Manage Assignment Status task in the Setup and Maintenance work area. If multiple user statuses exist for an HR status, you must designate any one user status as the default status corresponding to the HR status. The default assignment status is attached to an assignment unless you specify a default user status. For example, when you create an assignment, its status is set automatically to the default assignment status corresponding to the HR status Active.

Enforcing Grades at Assignment Level: Points to Consider

This topic describes the effects of the following employment-related profile options:

- PER_ENFORCE_VALID_GRADES
- PER_DEFAULT_GRADE_FROM_JOB_POSITION

Enforce Valid Grades (PER ENFORCE VALID GRADES)

If you set the PER_ENFORCE_VALID_GRADES site-level profile option to Yes, users can select a grade for an assignment. The grades can be selected only from those grades that are valid for the job or position.

- If users select a job and position for the assignment, they can select grades that are valid for the position only.
- If valid grades are defined for neither the job nor the position, users can select from all grades.

If you set this profile option to No (default value), users can select from all grades.

Default the Grade from the Job or Position (PER_DEFAULT_GRADE_FROM_JOB_POSITION)

You set the PER_DEFAULT_GRADE_FROM_JOB_POSITION site-level profile option to Yes, when there is only one valid grade for a job or position. In this scenario, by default, the valid grade is used in the assignment. Additionally, if an entry grade is defined for a position, by default, the grade is used when the user creates a new assignment.

If you set this profile option to No (default value), users can select from all grades.



Employment Lookups: Explained

This topic identifies common lookups that are employment-related and have user or extensible customization levels. Review these lookups, and update them as appropriate to suit enterprise requirements. You review lookups using the Manage Common Lookups task in the Setup and Maintenance work area.

Employment Contract Lookups

Employment contract lookups are described in the following table.

Lookup Type	Description	Customization Level
CONTRACT_TYPE	Type values, such as fixed-term, full-time, and seasonal	User

Assignment Lookups

Assignment lookups are described in the following table.

Lookup Type	Description	Customization Level
BUDGET_ MEASUREMENT_ TYPE	Work measure values, such as headcount and FTE	Extensible
EMP_CAT	Assignment categories, such as full-time regular and part-time temporary	User
EMPLOYEE_CATG	Worker type values, such as white collar, blue collar, and civil servant	User
BARGAINING_ UNIT_CODE	Codes that identify bargaining units, such as health professionals, steel workers, and public service workers	User
PER_ SUPERVISOR_ TYPE	Manager types, such as line manager, project manager, and technical manager	Extensible

Note: If your enterprise uses matrix management (where a worker assignment has multiple managers of different types), then you must review the predefined manager types in the PER_SUPERVISOR_TYPE lookup and add any missing types. You may also need to create job roles for managers other than line managers and ensure that they have appropriate access to the records of workers who report to them.

Terminations Lookups

Terminations lookups are described in the following table.



Lookup Type	Description	Customization Level
PER_ PDS_ REHIRE_REASON	Reasons, such as misconduct and poor performance, for not recommending rehire of a worker	User

Areas of Responsibility Lookups

Areas of responsibility lookups are described in the following table.

Lookup Type	Description	Customization Level
PER_ RESPONSIBILITY_ TYPES	Worker responsibilities, such as benefits representative, union representative and fire warden	Extensible

Employment Configuration Options: Explained

You can configure employment-related options at the enterprise level by using the Manage Enterprise HCM Information task in the Setup and Maintenance work area. The following table provides the description and default value for each option.

Option	Description	Default Value
Guided Flows: Future-Dated Records Validation	You can use this option to control whether managers can update assignments with future-dated records using the self service employment pages. You can select from the following values: None: No validation is displayed. Error: An error message is displayed indicating that the assignment has a future-dated record and the user is prevented from updating the assignment. Warning: A warning message is displayed indicating that the assignment has a future-dated record. The user can choose to ignore the message and continue with the transaction.	None
Termination: Existing Subordinates Validation	You can use this option to control whether users can terminate workers with direct reports using the Terminate Work Relationship page. You can select from the following values: Error: An error message is displayed indicating that the worker has direct reports and the user is prevented from terminating the worker.	Error



Option	Description Warning: A warning message is displayed indicating that the worker has direct reports. The user can choose to ignore the message and continue with the transaction.	Default Value
Employment: Approver Region Collapsed	You can use this option to control whether the Approvers region appears expanded or collapsed in the Review pages in employment flows. You can select from the following values: Y: The Approvers region appears collapsed. N: The Approvers region appears expanded.	Y
Default Enterprise Seniority Date	You can use this option to control whether the enterprise seniority date is automatically populated when you create a new work relationship. You can select from the following values: Yes: The enterprise seniority date is automatically populated. No: The enterprise seniority date is not automatically populated.	Yes

Configuring Seniority Dates: Explained

You can configure the rules for creating and defaulting seniority dates using the Configure Seniority Dates task in the Setup and Maintenance work area.

The seniority date rule defines the name and behavior of the seniority date. For example, you can define an enterprise seniority date at person level. When the first work relationship is created for a person, the enterprise seniority date is calculated from the start date of the work relationship.

Configuration Options

You can use the following options in the Configure Seniority Date Rules page:

Active: You can enable or disable the seniority date rule using this option. If the rule is active, seniority dates are automatically generated and defaulted when the employment data is changed, according to the rule definition. If the rule is not active, seniority dates are not generated and defaulted.

Note: You cannot edit or delete a seniority date rule if the corresponding seniority date configuration has been used to populate seniority dates for a person in the system. However, you can disable the seniority date rule in the Active field.

Code: You must select from one of the predefined code values, such as the bargaining unit seniority date - assignment level, enterprise seniority date - person level, and legal employer seniority date - work relationship level. These values are defined in the ORA PER SENIORITY ITEMS lookup type.



Seniority Attribute: You can define the seniority date configuration based on this attribute. For example, legal employer is the seniority attribute in case of a legal employer seniority date and enterprise is the seniority attribute in case of an enterprise seniority date. When the seniority attribute is logically created or modified, the corresponding seniority date will be populated in the system according to the rules in the setup.

Level: You can configure seniority dates at the person, work relationship, and assignment levels.

At the person level, all the work relationships and assignments for the given person will be considered while deriving the seniority date. At the work relationship level, all the assignments for the given work relationship will be considered while deriving the seniority date. At the assignment level, all the date effective records for the given assignment will be considered while deriving the seniority date.

Object: Identifies the business object associated with the seniority attribute. When you select the seniority attribute and level, the object field is automatically populated, and you cannot edit this value. For example, if you select bargaining unit and assignment, the object field is populated with the assignment value.

Source: Rule that defines how the seniority date is populated. When you select the seniority attribute and level, the source field is automatically populated, and you cannot edit this value. For example, if you select legal employer and work relationship, the source field is populated with the first matching work relationship start date rule. This rule indicates that the first work relationship to match the seniority rule is used to populate the seniority date. The start date of this work relationship will populate the seniority date.

Allow Edit: Specify whether users can override the seniority date using the Manage Seniority Dates task. If you set the value in this field to No, you cannot edit the corresponding seniority date on the Manage Seniority Dates page.

Seniority Filters

You can optionally display seniority filters in the configuration options and restrict the population of seniority dates by using different filter conditions. For example, if you use a filter condition worker type equal to employee, the seniority dates are populated for employees only.

Related Topics

Managing Seniority Dates: Explained

Checking and Correcting Employment Related Data Issues: Procedure

Use the Correct Employment Data Integrity Issues process to detect and correct any employment data integrity-related issues. Run this process from the Scheduled Processes work area.

The process reports and fixes the following issues:

- Invalid Person Type Usage Records
- Legal Employer Varies for Assignment and Work Relationship
- Work Terms With Primary Assignment Field Set to Y
- Business Unit Varies for Assignment and Work Terms
- Inactive Work Relationship Active Work Terms or Assignment
- Legislation Varies for Assignment and Work Relationship
- Assignment With People Group Without Structure Information



- Person Type Missing in Assignment Record
- User and System Person Types Vary in Assignments
- Supervisor Records Created After Termination Date
- Supervisor Records Extending Beyond Termination Date
- User and System Person Types Vary in Person Type Usages
- Overlapping Working Hour Pattern Records
- Flexfield Structure and People Group Vary in Assignments
- Primary Field Set to Y When Manager Type Not Line Manager

You must run the following procedures in the order specified to detect and correct any issues, and verify the results:

- 1. Selecting the process
- 2. Using Summary mode
- 3. Using Report mode
- 4. Using Update mode
- 5. Confirming whether issues are corrected

Selecting the Process

- Navigate to the Scheduled Processes work area (Navigator > Tools > Scheduled Processes).
- 2. Click Schedule New Process, and click Job in the Type field.
- 3. Expand the Name list, and click Search.
- **4.** Type **Employment** in the **Name** box, and click **Search**.
- 5. In the search results table, select Correct Employment Data Integrity Issues, and click OK.
- 6. In the Schedule New Process dialog box, click OK.

Using Summary Mode

Run the process in Summary mode to generate a .csv file listing the count of the issues, if any. You can run the process in this mode for a person or all people.

- 1. In the **Process Details** dialog box, select **Summary** from the **Mode** list.
- 2. In the **Name** list, select the person for whom you want to run the process.
 - Note: If you don't select a name from the list, the process runs for all people.
- 3. Click **Submit**, and click **OK** in the **Confirmation** dialog box. Note the process ID.
- 4. Click Close in the Process Details dialog box.

You can view the zip file when you select the row containing the process ID in the search results table in the Overview page.

Using Report Mode

If you find any issues in the .csv file, run the process in Report mode to generate a zip file. The zip file contains a .csv file for each integrity check. The .csv file provides details of the issues and the people affected by it

- Click Schedule New Process. Select Correct Employment Data Integrity Issues from the Name list, and click OK.
- 2. In the **Process Details** dialog box, select **Report** from the **Mode** list.
- 3. Click **Submit**, and click **OK** in the **Confirmation** dialog box. Note the process ID.
- 4. Click Close in the Process Details dialog box.



You can view the zip file when you select the row containing the process ID in the search results table in the Overview page.

Using Update Mode

Run the process in Update mode to correct the issues. After you run the process, a zip file is generated that contains a .csv file for each integrity check. The .csv file provides details of the issues post the update.

- Click Schedule New Process. Select Correct Employment Data Integrity Issues from the Name list, and click OK.
- 2. In the Process Details dialog box, select Update from the Mode list.
- 3. Click Submit, and click OK in the Confirmation dialog box. Note the process ID.
- 4. Click Close in the Process Details dialog box.

You can view the zip file when you select the row containing the process ID in the search results table in the Overview page.

Confirming Whether Issues are Corrected

Run the process again in Summary mode to confirm that the issues are corrected.

Related Topics

• Submitting Scheduled Processes and Process Sets: Procedure

FAQs for Define Employment Record Values

How can I display assignment numbers in the manager name list of values in employment flows?

Use the Manage Administrator Profile Values task in the Setup and Maintenance work area. Search for the profile option PER_EMP_MANAGER_NAME_LOV and update the profile value to N. The profile value is Y by default.

Define Documents

Document Types and Categories: Explained

You use document records to create and manage documents such as medical certificates, licenses, and visas. Use the Document Records work area to create and maintain document records for a person. To supplement the predefined document types, categories, and subcategories, you can create your own to suit the requirements of your enterprise.

Document Types

Document types (for example, leave approval or medical report) provide a lower level categorization of documents. The type of documents you can access depends on your role. For example, line managers, but not HR managers, may be able to view workers' payslips. Using the document type security profile, you can restrict which users or roles can access particular documents. The document type also indicates if the document requires approval. If you want to track the expiry of the document record, define **Valid Till** as a required or relevant attribute in the document type and specify the expiration notification period.



Document Categories

Document categories (for example, absence) provide a way to group these documents into meaningful categories at a higher level. Document subcategories (for example, general or medical) provide further grouping of documents. Use the **DOCUMENT_CATEGORY** lookup type to define new document categories and subcategories. Define document categories as values for the **DOCUMENT_CATEGORY** lookup type and document subcategories as extended lookup values for the selected category.

Related Topics

Creating Document Type Security Profiles: Examples

Document Delivery Preferences: Explained

You typically define delivery preferences for documents that are delivered periodically from employers to workers, for example, payslips, or year end tax statements. You can select default delivery methods for a document type, including online and paper, and specify other delivery related preferences. You set these preferences using the Manage Document Types task in the Setup and Maintenance work area.

Online Delivery Consent

You can specify whether worker consent is required for delivering documents online-only. If you set the Online Delivery Consent Required option to Yes and Initial Consent Granted to No, then the Delivery Method is automatically selected as Paper and the option is disabled for edit; the option is automatically deselected (while still disabled) when you set back Initial Consent Granted to No.

Overriding Default Preferences

You set default delivery preferences on the document type and override the preferences on associated work structures. You can override default delivery preferences at various levels for a payroll statutory unit (for payroll documents) or legal employer (for other document categories). These levels are arranged in a hierarchy. For example, delivery preferences set for a location override those set for a department and delivery preferences set for a department override those set for a legal employer. The document type is at the highest level in the hierarchy. The default delivery preferences you specify for a document type apply to all documents, if you do not override them at lower levels.

Person Level Overrides

You can enable persons to override the delivery preferences for their documents, in their portraits. The delivery preferences that workers specify in their portraits override delivery preferences specified elsewhere for the document type.

Creating a Context for the Document Descriptive Flexfield: Worked Example

When you create a document record, the flexfield segments are displayed based on the context selected for the document type. You can configure the flexfield context for a document type such that it is automatically selected when you create a document record. This example shows how you can do so.

To automatically populate the context, you must enter a context code for the document flexfield that exactly matches the internal document type.



The internal document type is generated as follows:

- Document type is valid for a specific country: The internal document type is derived as country code_document
 type name, all in uppercase. The spaces and hyphens in the document type name are replaced with underscores.
 For example, if the document type name is Loan Request and the document type is valid for India only, the internal
 document type takes the value IN_LOAN_REQUEST.
- Document type is global: The internal document type is derived as GLB_document type name. For example, if the
 document type name is Loan Request and the document type is valid for all countries, the internal document type
 takes the value GLB_LOAN_REQUEST.

Configuring the Context for the Document Descriptive Flexfield

- 1. Click Navigator > Setup and Maintenance.
- 2. On the Tasks panel drawer, click **Search**.
- 3. In the search box, enter Manage Document Descriptive Flexfields, and click the Search icon.
- 4. Click the Manage Document Descriptive Flexfields task name.
- 5. In the **Search Results** section, select the row for the Documents of Record Attributes descriptive flexfield, and click the **Edit** icon.
- 6. Click Manage Contexts and click the Create icon in the Search Results section.
- 7. In the **Display Name** field, enter the document type name. For example, enter **Loan Request**.
- 8. In the Context Code field, enter the code using a combination of the country code and the document type name. For example, if the document type name is Loan Request and the document type is specific to India, enter IN_LOAN_REQUEST.
 - Note: You must enter the context code using the following format: country code_document type name, all in uppercase. Replace any spaces or hyphens in the document type name with underscore (_). If the document type is applicable globally, replace country code with GLB.
- 9. Click Save and Close. The Manage Contexts page appears.
- 10. In the Search Results section, select the row for the context that you created, and click the Edit icon.
- 11. In the Context Sensitive Segments section, click the Create icon.
- 12. Create the context segments according to your business requirements. For example, you can create segments, such as Loan Start Date, Loan Type, and Loan Reason.
- 13. Click Save and Close four times.
- 14. Click Deploy Flexfield.
- **15.** In the **Confirmation** dialog box, click **OK**, and click **Done**.

After this, the flexfield context and its associated flexfield segments are automatically populated in the Create Document Record page when you select a document type.

FAQs for Define Documents

What's the purpose of creating a document record?

Create document records to store information about documents such as work permits and visas, and upload electronic versions of the documents as attachments. Use the Document Records work area to create and maintain document records for a person. Document records store necessary document details such as the period for which the document is valid. This information can then be used for reporting purposes. For example, HR specialists can see the reports of documents that are near expiration in their dashboard.



Why are some approvers already appearing for the document record?

You create a document record using the Manage Document Records task in your portrait. The document type you select when creating a document record determines whether the document record requires approval. The list of approvers is predefined for the document type, However, you can add additional approvers. You receive a notification once the document record is approved. Following approval, the document record is then accessible and available for use in reports and analytics, for example.

When are workers notified about delivery preferences for their documents?

Workers are notified when the default document delivery method changes from paper to online-only, or when you create a new document type delivered online-only. To change the delivery preference for a document type, use the Manage Document Types task in the Setup and Maintenance work area.

Define Checklists

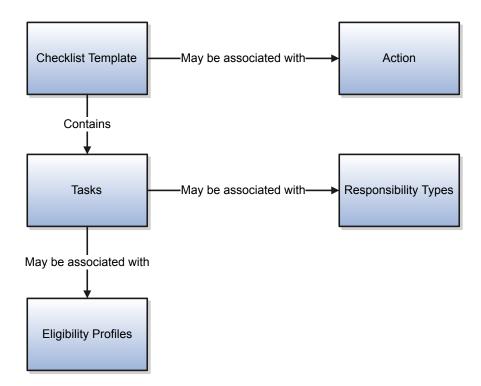
Checklist Components: How They Work Together

Use checklists for actions that require the completion of standard tasks, such as creating users or reassigning resources. For example, employee hire and termination actions typically require a number of people to complete standard tasks. You create and maintain tasks within a checklist template. You can create checklist templates that can be allocated to persons either automatically or manually. Create checklists using the Manage Checklist Templates task in the Setup and Maintenance work area.



The figure shows the components of a checklist template and their major relationships. The Human Resources (HR) specialist creates the checklist template and assigns tasks and actions.

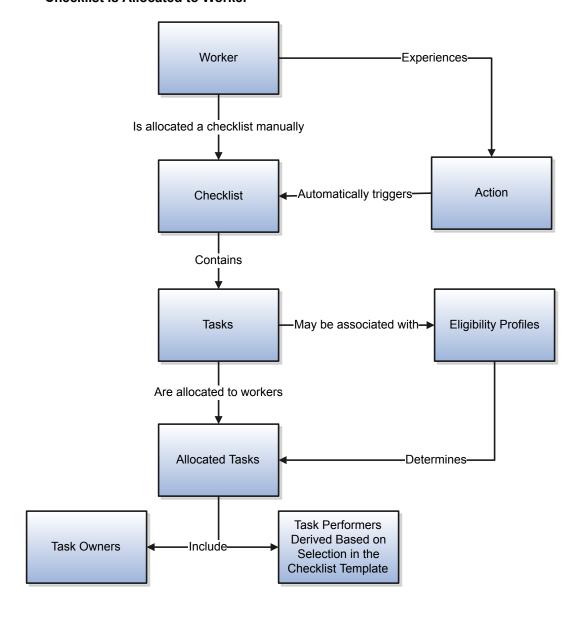
HR Specialist Creates Checklist Template



The figure shows the tasks workers perform for automatically allocated checklists for which they are eligible.



Checklist is Allocated to Worker



Action

Actions track changes in personal circumstances, for example, new hire, transfer, or termination. Link an action to a checklist template to allocate the checklist to persons automatically when they experience the action. The checklist template is still available for manual allocation, even if it is linked to an action.

Task

Creating, maintaining, and viewing tasks in templates can be performed by these roles:

- HR Specialists can create and maintain tasks in checklist templates and the allocated checklists.
- HR Analysts can only view the tasks.



Managers can create and maintain tasks in their allocated checklists only.

You can enter the task duration and specify if the task is required, during task creation. When the task is allocated, the target end date is derived based on the duration entered. The checklist status is automatically set to Completed once all the required tasks are complete though you can manually change the status anytime.

Eligibility Profile

Link an eligibility profile to a checklist task to control whether that task appears in a specific allocated checklist. The task appears in the allocated checklist of a worker only if the worker matches the eligibility criteria.

Task Performer

Performer is the person carrying out the task. You can select a performer in one of the following ways:

- Specify the performer's areas of responsibility in the checklist template; during checklist allocation, the persons with the selected responsibilities are automatically assigned as performers for the tasks and notified of the assignment.
- Select the worker as the performer
- Select the worker's line manager as the performer
- Select the initiator as the performer

 The initiator is the person who initiated the transaction, such as the action itself or the manual checklist allocation.

Based on your selection, the performer names are derived and displayed for the tasks in the allocated checklist. You can update the performer details for a task in an allocated checklist until the time the task is allocated to a user.

Allocated Checklist

Allocated checklists are those that have been allocated to workers and contain the tasks relevant to them.

Task Owner

Task owner, generally synonymous with a manager, is the person responsible for ensuring task completion. Managers can view the tasks within an allocated checklist and monitor the status themselves or assign alternative owners for the tasks. If a performer is invalid (person derived as performer is terminated, for example) or not assigned, the task owner is designated as the performer by default. If a checklist is assigned automatically to a person based on an action, then the task owner is the user who performed the action on the person.

Checklist and Task Statuses: Explained

Managers can display the allocated checklists for their workers, and update the checklist and task statuses, using the Manage Allocated Checklists action in their portrait. Performers can view the checklist tasks assigned to them in their worklist, update the task status, and review to whom the task is allocated. Task owners can review task allocation details. These statuses aren't used to determine the checklist or task availability; they are for information purposes only.

The checklist and task statuses are:

- Initiated
- Completed
- Rejected
- Outstanding
- In Progress



Suspended

Initiated

The status of the checklist and the tasks in the checklist is set automatically to initiated when you allocate the checklist.

Completed

Use this status to indicate that the checklist or task is complete. You can set the checklist status to completed only if all the required tasks are complete. The checklist status is set automatically to completed when you set the status of the last required task to completed. The task doesn't disappear from the allocated checklist or the worklist when you set the status to completed. You must delete it yourself if required.

Rejected

Use this status to reject a checklist, for example, because it was wrongly allocated to a person. Task owners or performers can use this status to decline ownership of a task, for example, if the task has been wrongly assigned to them.

Outstanding

Use this status to indicate that the checklist or task is not complete by the target date.

Other Task Statuses

Use the other statuses to record progress made against the checklist or tasks. For, example, use them to indicate that tasks are in progress or the checklist is suspended because of resources are unavailable.

Creating a Checklist Template: Worked Example

This example demonstrates how to create a checklist template that is automatically allocated to newly hired workers to track tasks involved in hiring a worker. The tasks in the checklist vary according to eligibility rules.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In this Example
Allocate checklist automatically?	Yes, checklist is allocated automatically to persons experiencing new hire action.
Which tasks to include in the checklist?	 Plan and Schedule Training Issue Laptop Procure Meal Vouchers
What are the task performers' responsibilities?	 The worker's line manager is the performer of the task Plan and Schedule Training Performer for the task Issue Laptop has the responsibility type IT Support Representative. The worker himself is the performer of the task Procure Meal Vouchers.
Do eligibility rules apply to any tasks?	 Issue Laptop task applies to manager users only. Procure Meal Vouchers task applies to work location India only.

Create a checklist template, associate it with the Hire action, and create three tasks for the template.



Prerequisites

- 1. Create an eligibility profile **Manager_Users** for all manager users.
- 2. Create an eligibility profile Work_Location_India for work location India.
- 3. Create a responsibility IT Support Representative and assign persons to this responsibility.

Creating a Checklist Template

- 1. On the Person Management Overview page, click **Manage Checklist Templates** to open the Manage Checklist Templates page.
- 2. Click Create.
- 3. On the Create Checklist Templates page, complete the fields, as shown in this table:

Field	Value
Name	New Hire
Category	On Boarding
Action	Hire

Creating Checklist Tasks

- 1. In the Tasks region, click **Create**.
- 2. For each task, complete the fields, as shown in this table:

Field	Plan and Schedule Training Task	Issue Laptop Task	Procure Meal Vouchers Task
Required	Yes	No	No
Eligibility Profile		Manager_Users	India_ Work_Location
Performer	Line Manager	Responsibility Type	Worker
Responsibility Type		IT Support Representative	

3. Click Submit.

Related Topics

• Eligibility Profiles: Examples

FAQs for Define Checklists

Can managers create checklist templates?

No. Managers can't create checklist templates which are available for allocation to all users. They can only create specific checklists for their workers, and allocate existing checklists templates to their workers, using the Manage Allocated Checklists



action in their portrait. Human Resource (HR) specialist users can create both checklist templates and checklists for specific persons. HR specialists can also save specific checklists as templates to make them available for allocation to all users.

How do changes in the checklist template affect allocated checklists?

Each allocated checklist is a specific instance of the checklist template. Therefore, changes in the checklist template don't affect allocated checklists. Similarly, the checklist template is unaffected by changes in allocated checklists.

Where can an owner or performer view details of the person to whom the task is allocated?

As a task owner or performer, you receive a worklist notification when a task is assigned to you. Click the person context information icon in the notification to view details of the person to whom the task is allocated.

Where do the checklist category values come from??

The values for a category are dependent on the country selected. If a category is configured for a country, then it will be displayed in the list. The country- category mapping is configured in the Manage Checklist Lookups task.

What's delay duration?

Delay duration enables you to delay the actual start date of the task for a specified time. For example, if you specify the target start date as Jan 1st and enter delay duration of 5 days, you can delay the actual start date until Jan 5th.

Schedule Processes for Person Search

Update Person Search Keywords: Explained

Several attributes of person, employment, and profile records are used as person-search keywords. To launch this process, use the Navigator > Scheduled Processes > Schedule New Process button in the search results table.

Keyword values are copied automatically from the originating records to the PER_KEYWORDS table, where they are indexed to improve search performance.

This topic explains:

- How person keywords are updated
- Why you run the Update Person Search Keywords process
- How to schedule the Update Person Search Keywords process

How Person Keywords Are Updated

You raise an event, when the value of a keyword attribute changes. For example, if a person acquires a language skill or a different phone number.

In response, services run a process to update the relevant attributes for the person in the PER_KEYWORDS table, therefore most changes are made in PER_KEYWORDS immediately and automatically. When you create a new person record, keyword values for that person are copied automatically to the PER_KEYWORDS table.



Why You Run the Update Person Search Keywords Process

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

- The automatic process doesn't apply future-dated changes to the PER_KEYWORDS table.
- The process also ensures that all changes are copied to the PER_KEYWORDS table, despite any temporary failures of the automatic process.

How to Schedule the Update Person Search Keywords Process

You can run the Update Person Search Keywords process manually or schedule it to run at regular intervals (for example, weekly at a specified time).

The likely volume and frequency of changes to person records in your enterprise will determine how often you run the Update Person Search Keywords process:

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

Running the Update Person Search Keywords process refreshes the whole PER_KEYWORDS table. Therefore, you must run the process at times of low activity to avoid performance problems.

Person-Record Keyword Searches: Explained

The application searches for keyword values in these attributes of a person's records: department, job name and code, position name and code, person name, primary e-mail, primary phone, work location, competencies, language skills, licenses and certifications, school education, awards and honors, affiliations, areas of interest, and areas of expertise.

This topic describes:

- Access to restricted information
- Keyword indexing
- Searches using name and keywords
- Searches using date-effective keywords

Access to Restricted Information

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

Keyword Indexing

Keywords are indexed values, which means that they are copied from person records and organized in a keywords table for fast retrieval. Most changes to person records are copied as they occur to ensure that the source and indexed values don't



differ. Your enterprise can also run a keyword-refresh process to update all keywords and fix any discrepancies. Depending on when this process was last run, some recent changes to person records may not appear in search results.

Searches Using Name and Keywords

The person search uses a person's full name instead of the first name or last name. The full name definition may vary for each country. For example, the full name definition for India may be First Name Middle Name Last Name, while the full name definition for Canada may be First Name Known As Last Name Suffix. You control the definition of the full name using the Manage Person Name Formats task in the Setup and Maintenance work area.

There is an implied OR condition between the search criteria when you use keyword search. When you use the name search, there is an implied AND condition between the search criteria For example, when you enter **Chris Harper** in the Name field, all person records that have both Chris and Harper in the full name are shown in the search results.

The following table lists the multiple ways in which you can enter keywords to search for persons.

You enter	Search Results
Harper Chris	Jenner, Chris
	Harper, Smith
	Chris, Ray
	Harper, Liam
	Harper, Chris
	Harper, Christopher
Chris Harper	Jenner, Chris
	Harper, Smith
	Chris, Ray
	Harper, Liam
	Harper, Chris
	Harper, Christopher
Chris%	Jenner, Chris
	Black, Chris
	Blake, Christopher
	Simpson, Christy
	Harper, Chris
	Harper, Christopher
	Christ Johnson
Chris	Jenner, Chris
	Black, Chris
	Harper, Chris
"Chris Harper"	Harper, Chris
Chris and Harper	Harper, Chris
"Chris" "Harper"	Harper, Chris



Searches Using Date-Effective Keywords

In the person search UI, you can enter an effective as-of date. When date-effective values, such as work location, are copied to the keywords table, their history isn't copied: only the latest change is stored in the keywords table. Therefore, if you enter both a keyword value and an effective as-of date, the search results may not be as expected.

For example:

- You change the work location of assignment 12345 from Headquarters to Regional Office on 27 January, 2011.
- The changed work location is copied automatically to the keywords table on 27 January, 2011.
- You search for a person on 1 February, 2011 using the keyword Headquarters and the effective as-of date 10 January, 2011.

Although the work location on 10 January, 2011 was Headquarters, assignment 12345 doesn't appear in the search results because the work location stored in the keywords table at the time of the search is Regional Office.

Optimize Person Search Keywords: Explained

The Oracle Text index in the PER_KEYWORDS table is utilized for person searches in Person Management work area, and the Directory. This index may become fragmented over a period of time and may cause a delay in displaying search results.

Why You Run the Optimize Person Search Keywords Index Process

You run the Optimize Person Search Keywords Index process to identify the fragmented indexes and help improve the overall search performance.

You run the Update Person Search Keywords process first and then the Optimize Person Search Keywords process.
 You cannot schedule both processes simultaneously. If you schedule them at the same time, the second process will wait for the first process to complete before it starts.

When to Run the Optimize Person Search Keywords Index Process

You must run the process daily at times of low activity with the options, Full mode and the appropriate maximum time. The default time is 180 minutes. Although, you specify a maximum time, but if the process is run consistently over time it may take about 10-30 minutes only.

However, you can run the Optimize Person Search Keywords Index process based on the size of your customer base, system usage, database usage, data loaders used, index fragmentation, and schedule of the Update Person Search Keywords process.

FAQs for Workforce Records

How can I enable the network at work features?

As an Implementor, you can enable and configure network at work using the Configure Offerings page in the Setup and Maintenance work area. You select the Network at Work functional area under the Workforce Deployment offering.



Social network integration is disabled by default. You can enable social network integration and specify whether to enable the Follow action and publish HCM profile updates to Oracle Social Network.

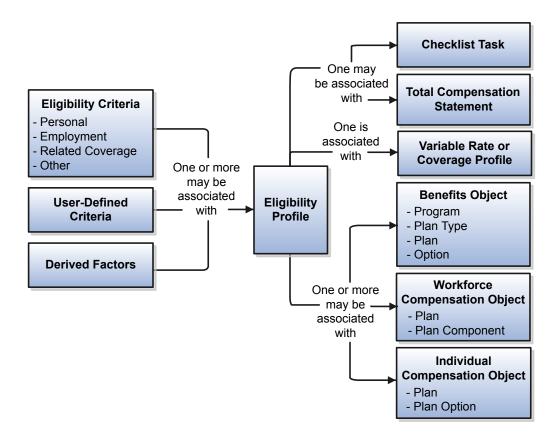


21 Eligibility Profiles

Eligibility Components: How They Work Together

You add eligibility criteria to an eligibility profile, and then associate the profile with an object that restricts eligibility.

The following figure shows the relationships between eligibility components.



Eligibility Criteria

You can add different types of eligibility criteria to an eligibility profile. For many common criteria, such as gender or employment status, you can select from a list of predefined criteria values. However, you must create user-defined criteria and derived factors before you can add them to an eligibility profile.

Eligibility Profile

When you add an eligibility criterion to a profile, you define how to use it to determine eligibility. For example, when you add gender as a criterion, you must specify a gender value (male or female) and whether to include or exclude persons who match that value.



Associating the Profile with Objects

This table describes associating eligibility profiles with different kinds of objects and whether you can attach more than one profile.

More than One Profile?	Associated Objects	Purpose
No	Variable rate or variable coverage profile	Establish the criteria required to qualify for that rate or coverage
No	Checklist task	Control whether that task appears in an allocated checklist
No	Total compensation statement	Apply additional eligibility criteria after statement generation population parameters
Yes	Benefits object	Establish the eligibility criteria for specific programs, plans, and options
Yes	Compensation object	Establish the eligibility for specific plans and options
Yes	Performance documents	Establish the eligibility for performance documents
Yes	Goal plans or goal mass assignments	Establish eligibility for the goal
One or more	Absence plan	Determine the workers who are eligible to record an absence that belongs to that plan

Derived Factors: Explained

Derived factors define how to calculate certain eligibility criteria that change over time, such as a person's age or length of service. You add derived factors to eligibility profiles and then associate the profiles with objects that restrict eligibility.

Derived Factor Types

Using the Manage Derived Factors task, you can create six different types of derived factors:

- Age
- Length of service
- A combination of age and length of service
- Compensation
- Hours worked
- Full-time equivalent



Determination Rules and Other Settings

For each factor that you create, you specify one or more rules about how eligibility is determined. The following table provides example settings for two factors.

Factor	Example Settings
Age derived	Select a determination rule to specify the day on which to evaluate the person's calculated age for eligibility.
	Example: If the determination rule is set to the first of the year, then the person's age as of the first of the year is used to determine eligibility.
Full-time equivalent	Specify the minimum and maximum full-time equivalent percentage and whether to use the primary assignment or the sum of all assignments when evaluating eligibility.
	Example: If 90 to 100 percent is the percentage range for the sum of all assignments, then a person who works 50 percent full-time on two different assignments is considered eligible.

For derived factors pertaining to time and monetary amounts, you can also set the following rules:

- Unit of measure
- Rounding rule
- Minimum and maximum time or amount

Derived Factors: Examples

The following scenarios illustrate how to define different types of derived factors:

Age

Benefits administrators frequently use age factors to determine:

- Dependent eligibility
- Life insurance rates

Age factors typically define a range of ages, referred to as age bands, and rules for evaluating the person's age. The following table illustrates a set of age bands that could be used to determine eligibility for life insurance rates that vary based on age.

Derived Factor Name	Greater Than or Equal To Age Value	Less Than Age Value
Age Under 25	1	25
Age 25 to 34	25	35
Age 35 to 44	35	45



n or Equal To Age Value Less Than Age Value
55
65
75

The determination rule and other settings for each age band are the same:

Field	Value
Determination Rule	First of calendar year
Age to Use	Person's
Units	Year
Rounding	None

Length of Service

A derived factor for length of service defines a range of values and rules for calculating an employee's length of service. The following table shows an example of a set of length-of-service bands. You can use the length-of-service bands to determine eligibility for compensation objects such as bonuses or severance pay.

Derived Factor Name	Greater Than or Equal To Length of Service Value	Less Than Length of Service Value
Service Less Than 1	0	1
Service 1 to 4	1	5
Service 5 to 9	5	10
Service 10 to 14	10	15
Service 15 to 19	15	20
Service 20 to 24	20	25
Service 25 to 29	25	30



Derived Factor Name	Greater Than or Equal To Length of Service Value	Less Than Length of Service Value
Service 30 Plus	30	999

The determination rule and other settings for each length-of-service band are the same:

Field	Value
Period Start Date Rule	Date of hire
	This sets the beginning of the period being measured.
Determination Rule	End of year
	This sets the end of the period being measured.
Age to Use	Person's
Units	Year
Rounding	None

Compensation

A derived factor for compensation defines a range of values and rules for calculating an employee's compensation amount. The following table shows an example of a set of compensation bands. You can use the compensation bands to determine eligibility for compensation objects such as bonuses or stock options.

Derived Factor Name	Greater Than or Equal To Compensation Value	Less Than Compensation Value
Less than 20000	0	20,000
Salary 20 to 34000	20,000	35,000
Salary 35 to 49000	35,000	50,000
Salary 50 to 75000	50,000	75,000
Salary 75 to 99000	75,000	100,000
Salary 100 to 200000	100,000	200,000
Salary 200000 Plus	200,000	999,999,999



The determination rule and other settings for each compensation band are the same:

Field	Value
Determination Rule	First of year
Unit of Measure	US Dollar
Source	Stated compensation
Rounding	Rounds to nearest hundred

Age to Use: Points to Consider

The **Age to Use** value that you select for an age derived factor determines whose birth date is used to calculate the derived age. The most common value is Person's.

Use the **Manage Derived Factors** task to configure age derived factors.

Person's Age

You usually use **Person's** as the **Age to Use** setting. With this setting, each person's own birth date is used to calculate age for eligibility evaluation, as shown in the following table.

Scenario	Result
You select Person's as the Age to Use value, and associate the age derived factor with a dependent eligibility profile.	Each dependent's eligibility is evaluated based on the age calculated from his or her own birth date.

Other Age to Use

To evaluate participant or dependent eligibility or rates based on another person's age, such as a spouse or child, select a value other than Person's.

The following table provides examples.

Scenario	Result
You select Person's oldest child as the Age to Use value, and associate this derived factor with a dependent eligibility profile.	Eligibility for all dependents is based on the age of the participant's oldest child. For example, all dependents become ineligible when the oldest child reaches the maximum age of eligibility.



Scenario	Result
You select Inherited Age as the Age to Use value, and associate this derived factor with a dependent eligibility profile.	Eligibility for all dependents is based on the date of birth as defined in the person extra information flexfield.

User-Defined Criteria: Explained

You can define your own eligibility criteria that meet any special requirements of your organization. Associate your criteria with eligibility profiles.

This topic provides an example and discusses creating and using a user-defined criteria.

Example

Your organization wants to use work-at-home assignment as the eligibility criteria for a monthly telecommunications allowance. The table and column already exist, but the data is not available from existing eligibility criteria tabs on the Create Eligibility Profile page. Therefore, you must first create the work-at-home criteria so that you can then use it with an eligibility profile.

Creating the Criteria

Use the **Manage User-Defined Criteria** task in the Plan Configuration work area. The data for the eligibility criterion that you create must be stored in a table that is accessible to the application. The procedure varies depending on the table.

Data Table	Procedure
Person Attributes or Assignments table	 Select the table and table column from lists. You must understand the basic structure of these tables.
	Select the lookup type to use to validate input values, including custom lookup types that you created for either table.
	For details, see the Setting Up Lookup-Based User-Defined Criteria: Worked Example topic. 3. If the field stores a numeric value or a date, specify a range of valid values.
Other tables	 Use the Manage Fast Formulas task in the Setup and Maintenance work area. Select your formula on the Create User-Defined Criteria page.

Using the Criteria

You can define one or two sets of criteria on the Create User-Defined Criteria page. The participant must meet the criteria defined in either set to be considered eligible or ineligible.

After you create your user-defined criteria, you can add it to an eligibility profile on the User-Defined Criteria tab in the **Other** category.

Related Topics

• Setting Up Lookup-Based User-Defined Criteria: Worked Example



User-Defined Criteria: Examples

The following scenarios illustrate how you can create different types of user-defined criteria for use in eligibility profiles associated with benefits and compensation objects. In each example, you must:

- 1. Create the user-defined criteria using the Manage User-Defined Criteria task in the Plan Configuration work area.
- 2. Add the user-defined criteria to an eligibility profile using the Manage Eligibility Profile task.
- 3. Set the criteria values to use in the eligibility profile.
- 4. Associate the eligibility profile with the relevant benefits or compensation object.

Base Eligibility on a Custom Attribute

Your commercial diving company wants to offer different benefit rates to employees who dive to depths greater than 330 feet. In the Setup and Maintenance work area, you set up the lookup type, value set, and global segment of the Person Attributes descriptive flexfield table to store the data for each worker. For details, see the Setting Up Lookup-Based User-Defined Criteria: Worked Example topic.

1. On either the create or edit page for user-defined criteria, set the following values.

Field	Value
Table	Person Attributes
Column	BEN_DIVE_DEPTH
Lookup	BEN_DIVE_DEPTH
Enable range validation one	Selected

- 2. On either the create or edit page for the eligibility profile, add the user-defined criteria to an eligibility profile.
- 3. On the Other tab, User-Defined Criteria subtab, set the following values.

You might have to refresh the Meaning list before you see the choice that you want. To do so, click another subtab, such as Formula, and then click the User-Defined Criteria tab again.

Field	Value
Set 1 Meaning	330
Set 1 To Meaning	9999
Exclude	Clear

4. Associate the eligibility profile with a benefit variable rate profile.



Base Eligibility on a Formula

Your company wants to offer a spot incentive bonus to hourly employees who worked 100 percent of their scheduled shift hours in a three-month period. In the Setup and Maintenance work area, you used the Manage Fast Formula task to create the formula that calculates Scheduled Hours minus Worked Hours for each week in the previous three months. If the result of successive calculations is less than or equal to zero, then the formula returns a result of Yes.

1. On the create or edit page for user-defined criteria, enter the following values.

Field	Value
Access One Formula	Worked_ Sched_ Hours_Percent
Enable range validation one	Clear

- 2. On either the create or edit page for the eligibility profile, add the user-defined criteria to an eligibility profile.
- 3. On the Other tab, User-Defined Criteria subtab, set the following values.

You might have to refresh the Meaning list before you see the choice that you want. To do so, click another subtab, such as Formula, and then click the User-Defined Criteria tab again.

Field	Value
Set 1 Meaning	Yes
Exclude	Clear

- 4. Associate the eligibility profile with the bonus compensation object.
- Tip: For very complex scenarios, your organization or implementation team can write a custom program to evaluate eligibility.

Use Eligibility to Exclude

Your organization wants to exclude workers with a work-at-home assignment from a transportation allowance.

1. On the create or edit page for user-defined criteria, set the following values.

Field	Value
Table	Assignment
Column	Work_at_home
Lookup	YES_NO



Field	Value
Enable range validation one	Clear

- 2. On either the create or edit page for the eligibility profile, add the user-defined criteria to an eligibility profile.
- 3. On the Other tab, User-Defined Criteria subtab, set the following values.

You might have to refresh the Meaning list before you see the choice that you want. To do so, click another subtab, such as Formula, and then click the User-Defined Criteria tab again.

Field	Value
Set 1 Meaning	Yes
Exclude	Selected

4. Associate the eligibility profile with the transportation allowance compensation object.

Related Topics

• Setting Up Lookup-Based User-Defined Criteria: Worked Example

Range of Scheduled Hours: Example

This example illustrates how to define eligibility criteria based on the number of hours a worker is scheduled to work within a specified period.

Weekly and Monthly Ranges

You want to limit eligibility for a benefits offering to workers who were scheduled to work either of the following ranges. Both ranges are as of the end of the previous quarter:

- Between 30 and 40 hours each week
- Between 130 and 160 hours each month

To do this, add two different ranges on the Range of Scheduled Hours subtab under the Employment tab of the create or edit eligibility profile pages. Set the values for the weekly range as shown in the following table:

Field	Value
Sequence	1
Minimum Hours	30
Maximum Hours	40



Field	Value
Scheduled Enrollment Periods	Weekly
Determination Rule	End of previous quarter

Set the values for the monthly range as shown in this table:

Field	Value
Sequence	2
Minimum Hours	130
Maximum Hours	160
Scheduled Enrollment Periods	Monthly
Determination Rule	End of previous quarter

Eligibility Profiles: Explained

Create eligibility profiles to define criteria that determine whether a person qualifies for objects that you associate the profile with. You can associate eligibility profiles with objects in a variety of business processes.

The following are key aspects of working with eligibility profiles:

- Planning and prerequisites
- Specifying the profile type, usage, and assignment usage
- · Defining eligibility criteria
- Excluding from eligibility
- Assigning sequence numbers
- Adding multiple criteria
- Viewing the criteria hierarchy

Planning and Prerequisites

Before you create an eligibility profile, consider the following:

- If an eligibility profile uses any of the following to establish eligibility, you must create them before you create the eligibility profile:
 - Derived factors
 - User-defined formulas
 - User-defined criteria



- Consider whether to combine criteria into one profile or create separate profiles depending on:
 - o Whether the object for which you're creating eligibility accepts only one eligibility profile or more than one
 - Performance considerations
- Use names that identify the criteria being defined rather than the object with which the profile is associated, because eligibility profiles are reusable.

Example: Use Age20-25+NonSmoker rather than Supplemental Life-Minimum Rate.

Specifying Profile Type, Usage, and Assignment Usage

This table describes the basic profile attributes that you specify when you create an eligibility profile:

Setting	Description			
Profile Type	Use only dependent profiles for Benefits plans or plan types when determining eligibility of participants' spouses, family members, or other individuals who qualify as dependents.			
	All other profiles are participant profiles.			
Usage	Determines the type of objects the participant profile can be associated with, such as benefits offerings and rates, compensation plans, checklist tasks, goal plans or mass goal assignments, or performance documents.			
	Selecting Global makes the profile available to multiple business process usages.			
Assignment to Use	Determines the assignment that the eligibility process evaluates for the person			
	Select Specific assignment when the usage is Compensation or Performance.			
	 Select a value that includes benefit relationship when the usage is Benefits. You select this value to restrict eligibility evaluation to active assignments that are associated with the benefits relationship of the person on a given date. If you select other values, then you might need to include eligibility criteria to exclude inactive assignments. 			
	 Select one of the following values for all other usages, such as total compensation statements: 			
	 Any assignment - enterprise 			
	o Employee assignment only - enterprise			
	o Primary employee assignment only - enterprise			

Defining Eligibility Criteria

Criteria defined in an eligibility profile are divided into categories:

Category	Description
Personal	Includes gender, person type, postal code ranges, and other person-specific criteria.
Employment	Includes assignment status, hourly or salaried, job, grade, and other employment-specific criteria.



Category	Description	
Derived factors	Includes age, compensation, length of service, hours worked, full-time equivalent, and a combination of age and length of service.	
Other	Other: Includes miscellaneous and user-defined criteria.	
Related coverage	Includes criteria based on whether a person is covered by, eligible for, or enrolled in other benefits offerings.	

Some criteria, such as gender, provide a fixed set of choices. The choices for other criteria, such as person type, are based on values defined in tables. You can define multiple criteria for a given criteria type.

Excluding from Eligibility

For each eligibility criterion that you add to a profile, you can indicate whether persons who meet the criterion are considered eligible or are excluded from eligibility. For example, an age factor can include persons between 20 and 25 years old or exclude persons over 65.

If you:

- Exclude certain age bands, then all age bands not explicitly excluded are automatically included.
- Include certain age bands, then all age bands not explicitly included are automatically excluded.

Assigning Sequence Numbers

You must assign a sequence number to each criterion. The sequence determines the order in which the criterion is evaluated relative to other criteria of the same type.

Adding Multiple Criteria

If you define multiple values for the same criteria type, such as two postal code ranges, a person must satisfy at least one of the criteria to be considered eligible. For example, a person who resides in either postal range is eligible.

If you include multiple criteria of different types, such as gender and age, a person must meet at least one criterion defined for each criteria type.

Viewing the Criteria Hierarchy

Select the View Hierarchy tab to see a list of all criteria that you have saved for this profile. The list is arranged by criteria type.



Combining Eligibility Criteria or Creating Separate Profiles: Points to Consider

You can define multiple criteria in an eligibility profile or create separate profiles for individual criterion. To determine the best approach, consider the following:

- Does the object for which you are defining eligibility allow multiple eligibility profiles?
- What is the best approach in terms of efficiency and performance?
- Are your criteria both inclusive and exclusive?

Allowable Number of Eligibility Profiles

If an object permits only one eligibility profile, you must include all criteria in a single profile.

The following table shows which objects permit only one profile and which permit more.

Only One Profile	One or More Profiles
 Checklist tasks Variable rate profiles Variable coverage profiles Total compensation statements Absence types 	 Benefits offerings Individual and workforce compensation plans Performance documents Goal plans or mass goal assignments Absence plans

Efficiency and Performance in the Benefits Hierarchy

For optimum performance and efficiency, attach profiles at the highest possible level in the benefits object hierarchy and avoid duplicating criteria at lower levels. For example, to be eligible for a plan type, a person must satisfy eligibility profiles defined at the program and plan type in program levels.

The following objects inherit the eligibility criteria associated with the program:

- Plan types in program
- Plans in program
- Plans
- Options in plans that are in programs

However, it's sometimes more efficient to create more than one profile and attach the profiles at various levels in the hierarchy. The following table illustrates applying successively restrictive exclusion criteria at different levels in the hierarchy:

Eligibility Profile Criteria		
Exclude employees who do not have an active assignment.		
Exclude employees who do not have a full-time assignment.		



Level	Eligibility Profile Criteria
Plan	Exclude employees whose primary address is not within a defined service area.

Using Both Inclusive and Exclusive Criteria

Eligibility criteria can be used to include or exclude persons from eligibility. Sequencing of criteria is more complicated when you mix included and excluded criteria in the same profile. For ease of implementation, keep excluded criteria in a separate eligibility profile.

Related Topics

- What happens if I include multiple criteria in an eligibility profile?
- Configuring Eligibility Criteria at General Vs. Detailed Hierarchy Levels: Example

Eligibility Profiles: Examples

The following examples show how to use eligibility profiles to determine which workers are eligible for a plan, compensation object, and checklist task.

In each case, you:

- 1. Create the eligibility profile using the Manage Eligibility Profiles task, which is available in several work areas, including Setup and Maintenance.
- 2. Associate the eligibility profile with the relevant object, such as a benefit plan.

Savings Plan Eligibility

A savings plan, such as a 401k plan, is restricted to full-time employees under 65 years of age. Create an eligibility profile to associate with your plan.

The following table provides the values for the eligibility profile definition.

Field	Value
Profile Usage	Benefits
Profile Type	Participant

Criteria Type	Name	Values	Select Exclude Check Box
Employment	Assignment Category	Full-Time	No
Derived Factor	Age	Select an age derived factor for the age band of 65 and older	Yes



Criteria Type	Name	Values	Select Exclude Check Box

Bonus Eligibility

You offer a bonus to all employees who received the highest possible performance rating in all rating categories. Create an eligibility profile to associate with your Bonus compensation object.

The following table provides the values for the eligibility profile definition.

Field	Value
Profile Usage	Compensation, or Global
Profile Type	Participant
Assignment to Use	Specific Assignment

The following table provides the values for the eligibility criteria for each rating category.

Criteria Type	Name	Values	Select Exclude Check Box
Employment	Performance Rating	Select the performance template and rating name, and then select the highest rating value	No

Checklist Task Eligibility

A new hire checklist contains tasks that don't apply to employees who work in India. Create an eligibility profile to associate with each checklist task that doesn't apply to workers in India.

The following table provides the values for the eligibility profile definition.

Field	Value
Profile Usage	Checklist
Profile Type	Participant

The following table provides the values for the eligibility criteria.



Criteria Type	Name	Values	Select Exclude Check Box
Employment	Work Location	India	Yes

Related Topics

- How can I restrict benefits enrollment opportunities based on provider location?
- · Configuring Grandfathered Benefits Eligibility: Procedure

Creating a Participant Eligibility Profile: Worked Example

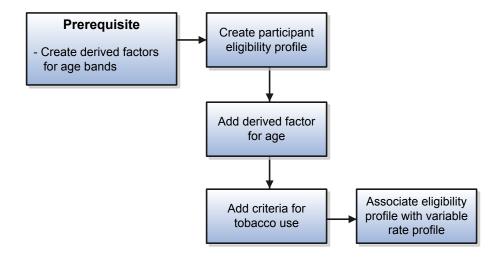
This example demonstrates how to create a participant eligibility profile used to determine eligibility for variable life insurance rates. Use the Plan Configuration work area to complete these tasks.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In this Example
What is the profile type?	Participant
What type of object is associated with this profile?	Variable rate for benefits offering
What types of eligibility criteria are defined in this profile?	Age derived factor (must have been previously defined) Uses Tobacco criteria
Should persons meeting these criteria be included or excluded from eligibility?	Included



The following figure shows the tasks to complete in this example:



In this example, you create one eligibility profile that defines the requirements for a single variable rate.

- Typically, you create a set of eligibility profiles, one for each variable rate.
- Create a separate profile for each additional rate by repeating the steps in this example, varying the age and tobacco use criteria.

Prerequisites

1. Create an age derived factor for ages less than 30.

Creating the Eligibility Profile

Use default values for fields unless the steps specify other values.

- 1. In the Tasks panel drawer, click **Manage Eligibility Profiles** to open the Manage Eligibility Profiles page.
- 2. On the Create menu, select Create Participant Profile.
- 3. In the Eligibility Profile Definition section, complete the fields as shown in this table.

Field	Value
Name	Age Under 30+ Non-Smoking
Profile Usage	Benefits
Status	Active
Assignment to Use	Any assignment - benefit relationship



Adding the Derived Factor for Age

Use default values for fields unless the steps specify other values.

- 1. In the Eligibility Criteria section, select the **Derived Factors** tab.
- 2. On the Age tab, click Create.
- 3. Complete the fields as shown in this table.

Field	Value
Sequence	1
Age	Select the derived factor that you previously defined for ages under 30
Exclude	Make sure that it is not selected

Adding the Criteria for Tobacco Use

Use default values for fields unless the steps specify other values.

- 1. Select the **Personal** tab.
- 2. On the Uses Tobacco tab, click Create.
- 3. Complete the fields as shown in this table.

Field	Value
Sequence	1
Tobacco Use	None
Exclude	Make sure that it is not selected

4. Click Save and Close.

Associating the Eligibility Profile with a Variable Rate Profile

Use default values for fields unless the steps specify other values.

- 1. In the Tasks panel drawer, click Manage Benefits Rates to open the Manage Benefits Rates page.
- 2. Select the Variable Rates tab.
- 3. Click Create.
- 4. In the Eligibility Profile field, select the eligibility profile you just created.
- **5.** Complete other fields as appropriate for the rate.



6. Click **Save and Close**.

Related Topics

• Creating a Variable Rate: Worked Example



22 Predictive Models for HCM

Managing Predictive Models: Explained

Oracle Fusion Workforce Predictions provides predefined models for the prediction of worker performance and voluntary termination. Each predictive model is based on multiple attributes.

You can:

- Run predictive models to provide up-to-date predictions.
- Remove individual predictive models from the predictions process.
- Remove individual attributes from the predictive models or what-if analyses.
- Create predictive attributes to include in the predefined predictive models or what-if analyses.

Running Predictive Models

When you run a predictive model, the process Collect Data and Perform Data Mining for Predictive Analytics is invoked immediately to:

- Rebuild the selected predictive models.
- Make predictions based on scores derived during the build process.

If the volume of relevant transactions (such as transfers, hires, terminations, and promotions) is high in your enterprise, then you can schedule the process to run weekly. At a minimum, you're recommended to run the process monthly to take account of latest data trends. When scheduled, the process rebuilds and runs all predictive models.

If you add attributes to or remove attributes from a predictive model, and you want to include those changes in predictions immediately, then you need to run the predictive model immediately. Don't wait for the next scheduled run of Collect Data and Perform Data Mining for Predictive Analytics.

Removing Predictive Models

To remove a predictive model from the predictions process, you deselect the **Include in Predictions** option for the model. In this case, the model is excluded when you run Collect Data and Perform Data Mining for Predictive Analytics, whether you run it immediately or as a scheduled process. Consequently, related analytics in transactional flows, such as Promote Worker, are empty.

Creating and Editing Predictive Attributes

You can create predictive attributes to include in the predefined predictive models. To derive the value of the new attribute, you create a fast formula database item (DBI) group and select it in the **Formula Function** field. You can also control which predefined and locally created predictive attributes appear in what-if analyses.

In Oracle Cloud environments, you can't create formula functions. Therefore, you may not be able to create predictive attributes.



You can edit or delete any predictive attribute that you create. You can't edit or delete predefined predictive attributes. For any attribute, you can edit how the attribute appears in what-if analyses. For example, you can change the minimum and maximum values on a slider scale.

Related Topics

• Voluntary Termination: How It Is Predicted

• High Performance: How It Is Predicted



23 Other Setup and Maintenance Tasks

Define 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

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.



- 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.
 - o 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.



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

FAQ for 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.



Deep Links: Explained

You can use deep links to open pages without navigating through the menu structure. This capability is most useful if you have internal corporate portals and you want to enable direct navigation from the portals into the Oracle Fusion HCM Application for your employees. For example, you can enable direct navigation to Payslips, Personal Information, Absence Entry, Directory search, My Team page, and other pages.

To view a complete list of the available deep links, use the Deep Links task in the Tools menu in the Navigator. The list of deep links that appear in the page is based on your functional and data security.

As an application implementation consultant, HR specialist, or line manager, you can copy a deep link and paste it in another application. You do not need to know the URL format to use this capability. Simply copy the URL from the Deep Links page and use it in your portals as is.

Login and Security

All users have the ability to view deep links based on their functional security. The FND_VIEW_ADMIN_LINK_PRIV privilege enables the Deep Links menu item in the Navigator.

If you click on a deep link URL from outside of the application and have not yet signed in, you are automatically redirected to the sign-in page. Functional security that enables deep links is only needed if you want users to see the list of available links.

End users do not need to have functional security added to their role in order to leverage the exposed deep links. The links will always automatically resolve and use the users' logged in context to display the information.





24 Import and Export of 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

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.
- 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

accounting flexfield

The structure that determines the chart of accounts, including the number and order of the individual segments, as well as assigning the value sets to the segments.

action

The kind of access, such as view or edit, named in a security policy.

ADF

Acronym for Application Developer Framework. A set of programming principles and rules for developing software applications.

analytics

Business intelligence objects such as analyses and dashboards that provide meaningful data to help with decision making.

application identity

Predefined application level user with elevated privileges. An application identity authorizes jobs and transactions for which other users are not authorized, such as a payroll run authorized to access a taxpayer ID while the user who initiated the job is not authorized to access such personally identifiable information.

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.

balancing segment

A chart of accounts segment used to automatically balance all journal entries for each value of this segment.

band

A specified range of values. Example: An age band defines a range of ages, such as 25 to 30, used to determine a person's eligibility.

behaviors

The actions exhibited by employees to demonstrate a competency. Behaviors are also referred to as subcompetencies.

benefits object hierarchy

A structure that enables efficient management of benefits that share similar attributes. The four object types used to structure benefits offerings are programs, plan types, plans, and options.



benefits offering

Any of an organization's nonsalary components of employee benefits packages, such as health, savings, life insurance, recreation, goods, or services.

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 intelligence catalog

The repository where all business intelligence objects, including analytics, reports, briefing books, and agents, are stored. The catalog contains separate folders for personal, shared, and custom objects.

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.

calculation card

Captures values required for payroll calculations for some earnings and deductions, such as absence payments and involuntary deductions. For some countries, you can also create various types of cards to hold default values for tax reporting units or payroll statutory units.

calculation value definition

The rates, amounts, or rules that payroll runs use to calculate the components listed on a calculation card.

calendar event

A period that signifies an event, such as a public holiday or a training course, that impacts worker availability.

chart of accounts

The account structure your organization uses to record transactions and maintain account balances.

competency

Any measurable behavior required by an organization, job, or position that a person may demonstrate in the work context. A competency can be a piece of knowledge, a skill, an attitude, or an attribute.



condition

The part of a data security policy that specifies what portions of a database resource are secured.

content item

An individual quality, skill, or qualification within a content type that you track in profiles.

content library

A repository of the content types and individual content items that can be associated with person profiles and profiles for workforce structures such as jobs and positions.

content type

An attribute such as a skill, quality, or qualification that is added to a profile.

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.

contingent worker

A self-employed or agency-supplied worker. Contingent worker work relationships with legal employers are typically of a specified duration. Any person who has a contingent worker work relationship with a legal employer is a contingent worker.

corporate rate type

Rate you define to standardize rates used in conversion of one currency to another over a period of time. This rate is generally a standard market rate determined by senior financial management for use throughout the organization.

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.

country holding company

A legal entity that acts on behalf of several divisions within an enterprise, and is the legal employer in a country.



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.

department

A division of a business enterprise dealing with a particular area of activity.

derived factor

Calculated eligibility criterion that changes over time, such as age or length of service.

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.

determinant type

The value that affects sharing of reference data in a transaction across organizations, such as a business unit or a cost organization.

determinant type

An optional value that affects document sequencing in a transaction. The available determinant types are Business Unit, Ledger, Legal Entity, and Tax Registration.

determinant value

A value specific to the selected determinant type of a document sequence. If Ledger is the determinant type for a document sequence, the determinant value is the specific ledger number whose documents are numbered by the document sequence. It is relevant in a document sequence assignment only if the document sequence has a determinant type.

disability organization

An organization with which employee disabilities are registered.

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.

educational establishment

A school, college, university, or other learning institution.

effective as-of date

A date used for filtering search results for date-effective objects. For objects that match the search criteria, the search results include the physical record in effect on the specified date.

effective start date

For a date-effective object, the start date of a physical record in the object's history. A physical record is available to transactions between its effective start and end dates.

eligibility profile

A user-defined set of criteria used to determine whether a person qualifies for a benefits offering, variable rate or coverage, compensation plan, checklist task, or other object for which eligibility must be established.

enterprise

An organization with one or more legal entities under common control.

entitlement

Grant of access to functions and data. Oracle Fusion Middleware term for privilege.

extensible flexfield

Customizable expansion space used to capture multiple sets of information within a context or multiple contexts. Some extensible flexfields let you group contexts into categories.

external system or external application

A system or application that is external to and not part of Order Management. An order capture system that resides upstream of Order Management is an example of an external system. A fulfillment application that resides downstream of Order Management is an example of an external application.

fast formula

A simple way to write formulas using English words and basic mathematical functions. Formulas are generic expressions of calculations or comparisons that repeat with different input values.



feature choice

A selection you make when configuring offerings that modifies a setup task list, or a setup page, or both.

fixed rate type

Rate you set between two currencies that remains constant. For example, a rate set between the euro currency and each Economic and Monetary Union (EMU) currency during the conversion to the euro currency.

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.

free-form content type

A content type that contains a code, name, and description only, and does not contain any properties until you add it to a profile type.

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 name

A person's name in a format and language that can be understood throughout a multinational enterprise.

grade

A component of the employment model that defines the level of compensation for a worker.

grade rate

Used to define pay values for grades in a legislative data group.

HCM

Abbreviation for Human Capital Management.

headcount

A work measure recorded on an assignment. By default, the headcount of an organization is the total of primary assignments in primary work relationships.



HR

Abbreviation for human resource.

HR status

Tracks worker's progress through the assignment, whether the assignment is active, suspended, or inactive.

incident

A collection of diagnostic information about a critical error, providing details about the state of the application when the issue occurred.

instance qualifier set

A set of values that uniquely identifies multiple instances of the same profile item.

interface table

A database table that stores data during data transfer between applications or from an external system or data file.

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.

item master

A collection of data that describes items and their attributes recorded in a database file.

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.

iob 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.



key flexfield segment instance

A single occurrence of a key flexfield segment in a key flexfield structure instance.

key flexfield structure

The arrangement of segments in a key flexfield. In some cases, you can define multiple structures for a single key flexfield.

key flexfield structure instance

An occurrence of a key flexfield structure that shares the same order of segments as other instances of the key flexfield structure. However, each instance uses different value sets to validate the segments.

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.

line of business

Set of one or more highly related products which service a particular customer transaction or business need. Refers to an internal corporate business unit.

local name

A person's name in a format and language that are readily understood by users in a single country but that may not be understood throughout a multinational enterprise.



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.

mainline metadata

The primary branch of metadata that a sandbox is published to. Once published, changes made in the sandbox become available to all users.

model profile

A collection of the work requirements and required skills and qualifications of a workforce structure, such as a job or position.

Navigator

The menu in the global area that you can use to open the work areas and dashboards that you have access to.

node

A logical term that refers to the data in a specific data source such as a product-specific table or a storage entity. A tree management solution must have established the data source.

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.

OWLCS

Abbreviation for Oracle WebLogic Communication Services. Offers the TPCC service to Oracle Sales Cloud and sets up the calls using SIP integration with the telephony network.

party

A physical entity, such as a person, organization or group, that the deploying company has an interest in tracking.

payroll status

Indicates whether payroll runs process the assignment. Valid values are Process, Do not process, Process when earning, and Process nonrecurring element entry.

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.

performance document

Online document used to evaluate a worker for a specific time period. The document contains the content on which the worker is evaluated, which could include goals, competencies, and questionnaires.



person number

A person ID that is unique in the enterprise, allocated automatically or manually, and valid throughout the enterprise for all of a person's work and person-to-person relationships.

person profile

A collection of skills, experience, qualifications, work preferences, and career planning information for a worker.

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 work schedule

Schedule that the application uses to determine the worker's availability.

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.

profile option level

The category or layer that defines a profile option. Site, Product, and User are the predefined levels.

profile option value

The setting mapped to the level of a profile option. A profile option may have multiple values set at different levels, such as Site or User.

profile type

A template that defines the content sections of a profile, role access for each section, and whether the profile is for a person, or for a workforce structure such as a job or position.



project expenditure organization

An organization that can incur expenditures and hold financial plans for projects.

PSTN

Abbreviation for public switched telephone network which is the network of the world's public circuit-switched telephone networks

question library

A central repository of reusable questions to include in questionnaires.

questionnaire

A set of questions presented in a specific order and format.

rating model

A scale used to measure the performance and proficiency of workers.

reference data

Data in application tables that is not transactional or high-volume, which an enterprise can share across multiple organizations. For example, sales methods, transaction types, or payment terms.

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.



report

An output of select data in a predefined format that's optimized for printing.

role

Controls access to application functions and data.

role provisioning

The automatic or manual allocation of a role to a user.

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

Classified and grouped reference data that organizational entities share.

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.

spot rate type

Rate you enter to perform conversion based on this rate as of a specific date. This rate applies to the immediate delivery of a currency.

talent review

A series of meetings where organization managers evaluate trends, assess strengths, and address areas of risk for the organization.



territory

A legally distinct region used in the country field of an address.

transfer

The movement of a person within the same legal employer.

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.

tree node

One of the branching points in a tree structure. It corresponds to a primary key in the view object of data.

tree structure

A set of guidelines or a framework applied to create a tree, include data, version a tree, or access a tree.

tree version

An instance of a tree that includes life cycle elements such as start and end dates, and indicates whether the tree is active. If a tree is associated with a reference data set, all tree versions belong to one set.

user rate type

Rate you enter at journal entry time to convert foreign currency transactions to your ledger currency.

user-defined criteria

Custom factors used to determine eligibility for objects such as benefits offerings and rates.

value set

A set of valid values against which values entered by an end user are validated. The set may be tree structured (hierarchical).

work area

A set of pages containing the tasks, searches, and other content you need to accomplish a business goal.

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.



work schedule exception

An event that impacts the normal working pattern in a work schedule.

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.

