

LIVE

20/01/20

Evosys • Live

Advisory  
Webinar

# 21A – Global HR

Empowering you for the next update



ORACLE

Partner



**Host:** Chris Gomes  
Account Director –  
Technology

**Speakers:** Purva Sharma  
Consultant –HCM

**Q/A:** Brain Patel  
Principal Consultant  
HCM



Oracle's Global  
Partner of Year  
(2017, 2019)

Featured in Gartner  
MQ for Oracle Cloud  
(2019, 2020)

# AGENDA

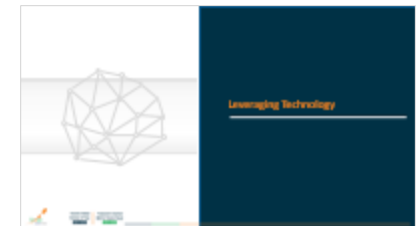
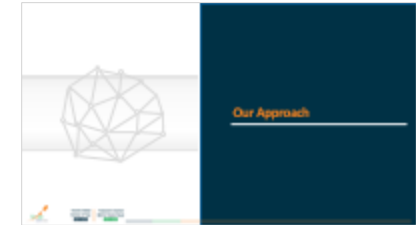


Our Approach to Oracle Update

Our Analysis of Latest Release

Leveraging Technology

Closing - Q&A





## Our Approach

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## Analyze

Evaluate new features to prioritize the uptake of those that improve user experience and productivity.

## Plan

Business and IT teams collaborate on the strategy for the uptake of new features and go-live.

## Test

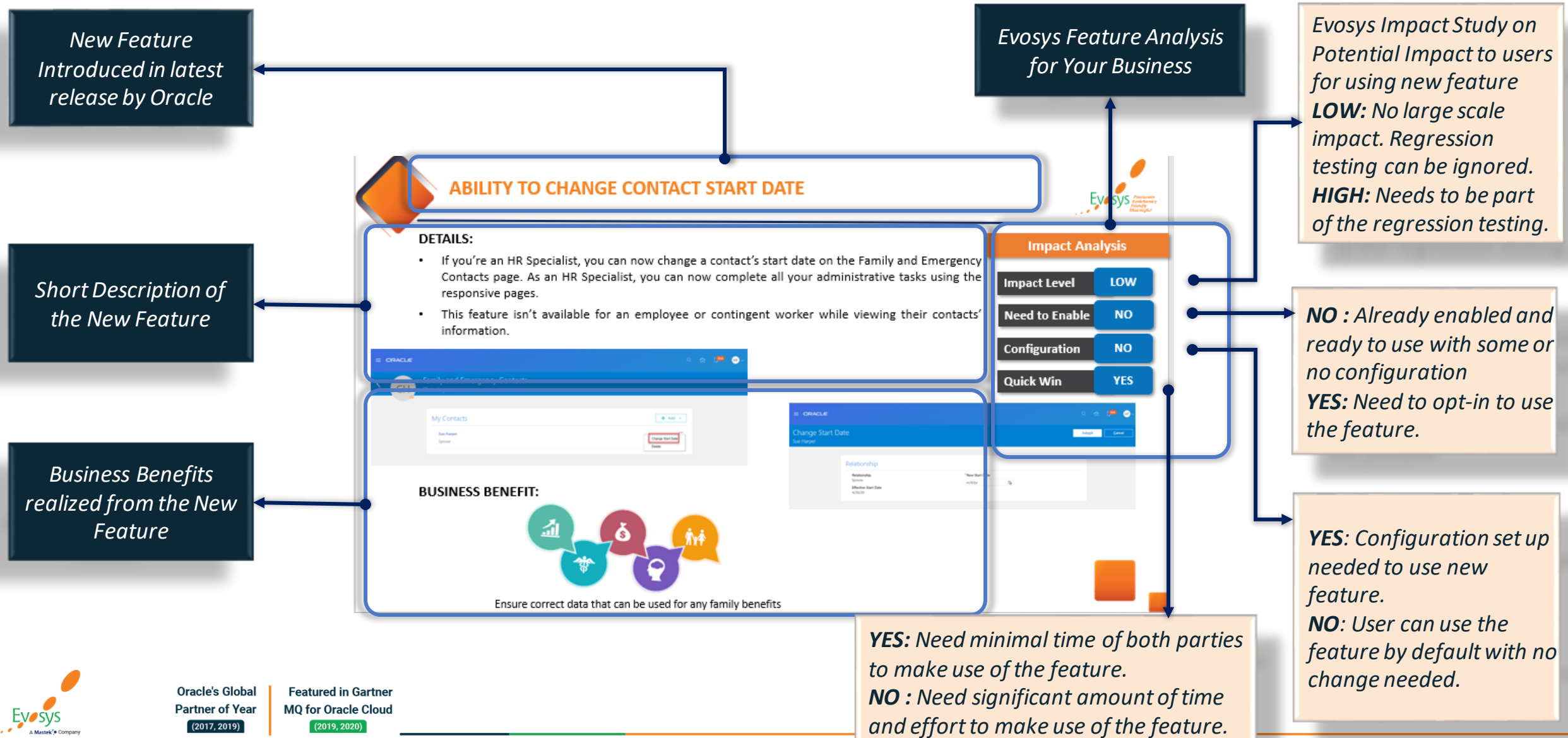
Execute regression and user acceptance testing on key flows.

## Launch

Go live with new features, documenting feedback for ongoing success along with Post Update Support



# How to read each Feature Summary?

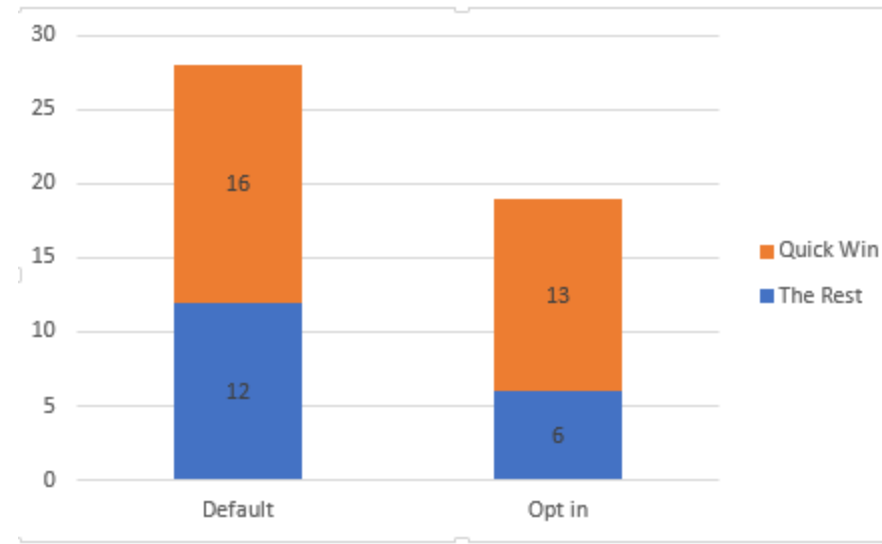
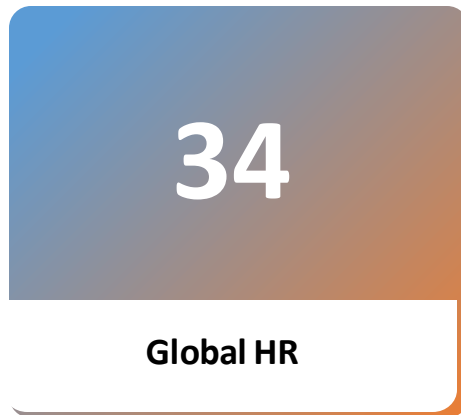




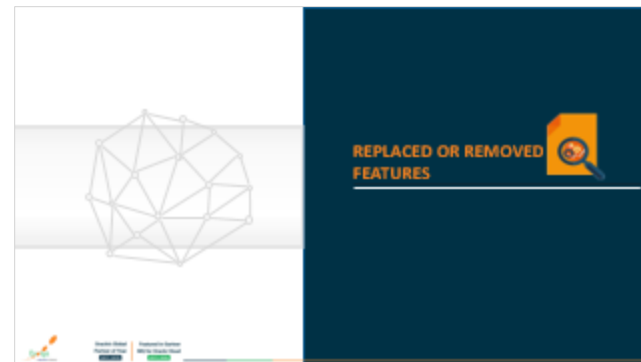
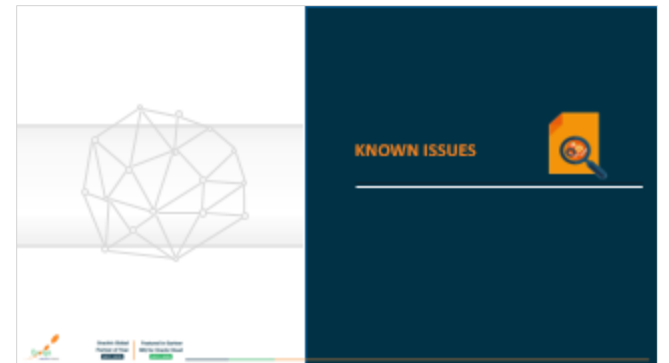
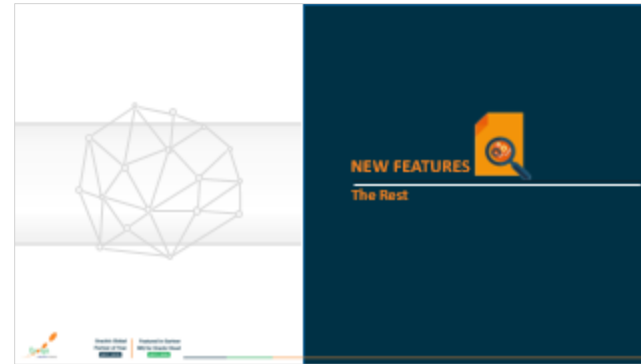
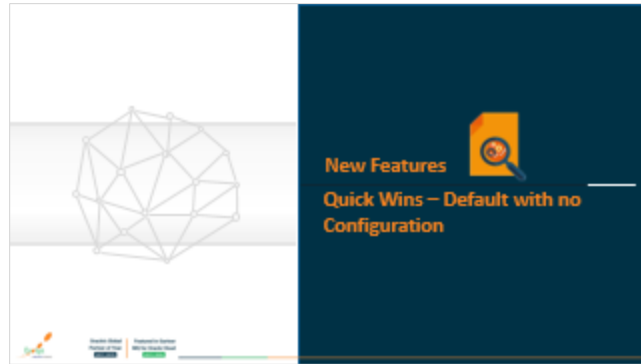
## Our Analysis of Latest Release - New Features

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# Evosys Analysis - Statistics



# Evosys Analysis







## New Features



## Quick Wins – Default with no Configuration



# HCM Common Features



Oracle's Global  
Partner of Year  
(2017, 2019)

Featured in Gartner  
MQ for Oracle Cloud  
(2019, 2020)

# Visibility of objects that support being rolled back

- Understand which HCM Data Loader objects support their data being rolled back from the application tables.

View Business Objects								
Refresh All Objects View Process Results								
Refresh Object Sort By								
Element								
Product Area	Business Object	Description	File Name	Template File	Overview	Last Refreshed	Load Order	Roll Back Supported
Global Payrol...	Element Entry	An element entry holds the actual payroll element and benefits granted to...	ElementEntry.dat			9-22-2020	105000	Yes
Global Payrol...	Element Entry Cos...	An element entry holds the actual payroll element and benefits granted to...	ElementEntryWi...			9-22-2020	105100	No
Global Payrol...	Element Duration ...	The element duration dates control when element entries for an employe...	ElementDuratio...			9-21-2020	140451	No

- Drilling down to the Business Object details page, the Component Details tab displays the level of roll back support:

## Component

Name	Element Entry
Description	An element entry holds the actual payroll element and benefits granted to a worker. These may be ongoing recurring entries, for example, salary, or single period non-recurring entries such as a bonus.
Supported Actions	Create, update and delete
Roll Back Supported	Newly created records only
Required	For new records
Integration Object Name	ElementEntry

## Business Benefit:



## Impact Analysis

Impact Level

LOW

Need to Enable

NO

Configuration

NO

Quick Win

YES

# Processed Source Files Automatically Deleted

- When you load files, even those selected from your desktop, the file is placed on the WebCenter Content server in the HCM Data Loader import account.
- Your processed source files will now automatically be deleted from the Oracle WebCenter Content server, once they have expired.

## Business Benifit:

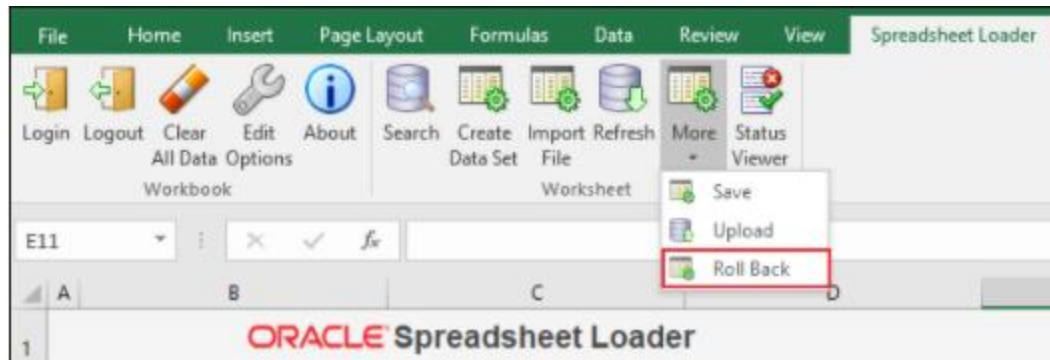


## Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	NO
Quick Win	YES

# HCM spreadsheet data loader- Roll back spreadsheet

- Roll back the spreadsheet data you have loaded, using the new Roll Back button available on the Spreadsheet Loader toolbar:



## Impact Analysis

Impact Level	HIGH
Need to Enable	NO
Configuration	NO
Quick Win	YES

## Business Benifit:



## Tips & Consideration:

- You can only roll back data that hasn't been updated since it was loaded and only for the objects which support being rolled back.

# Maximum days retention for extended data sets

- Data sets containing data for business objects supporting roll back can be retained for an extended period of time.
- The maximum duration has been reduced to 60 days since the data set was last processed.

## Business Benifit:

- Data sets are automatically deleted after they expire.

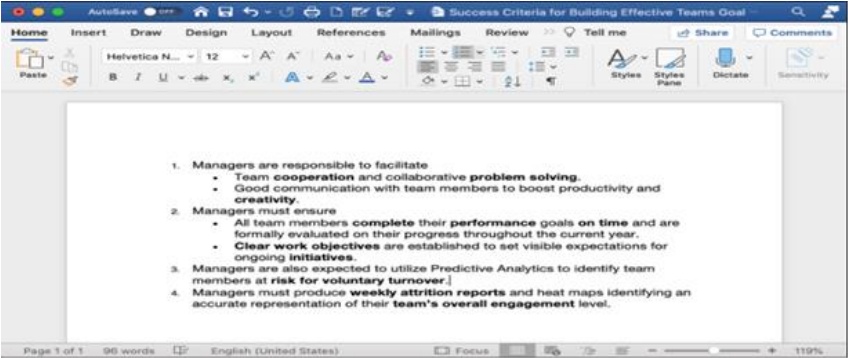
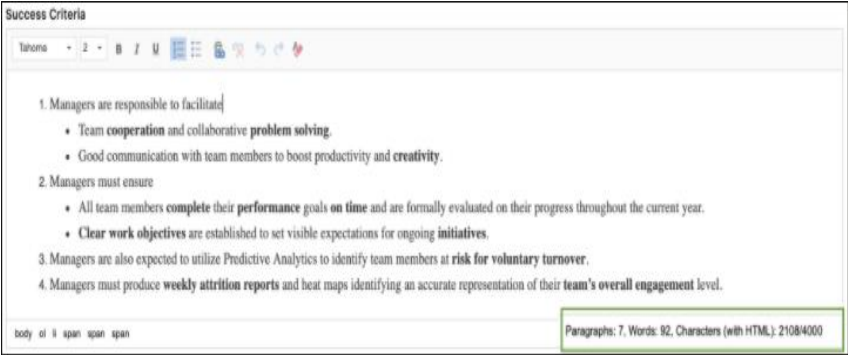


## Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	NO
Quick Win	YES

# Enhanced Rich Text Editor

- The Rich Text Editor has been enhanced to support several new capabilities.
- It's used in HCM products like Goals to define the success criteria.



## Impact Analysis

Impact Level **LOW**

Need to Enable **NO**

Configuration **NO**

Quick Win **YES**

## Business Benifit:

- This feature improves user experience while adding text in the editor.





# Global HR

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MQ for Oracle Cloud  
(2019, 2020)



# Update contact relationship start dates when hire date is changed

- A worker's contact's start date is also changed accordingly when the worker's hire date is changed.
- In addition to the contact's start date changing, the dates of the contact's details are also changed, such as their name, address and other details that have dates.
- However, there are some use cases where the start date of the contact's details may not change when the contact is a shared contact with another worker, the contact is a coworker, or there are effective-dated changes to the contact's details that can't be resolved programmatically.

## Impact Analysis

Impact Level	HIGH
Need to Enable	NO
Configuration	NO
Quick Win	YES

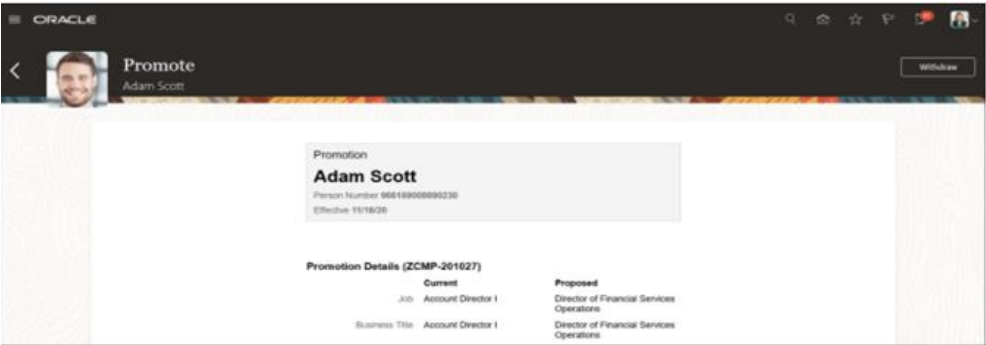
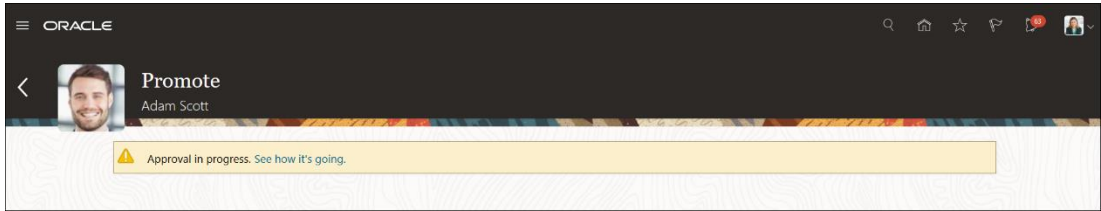
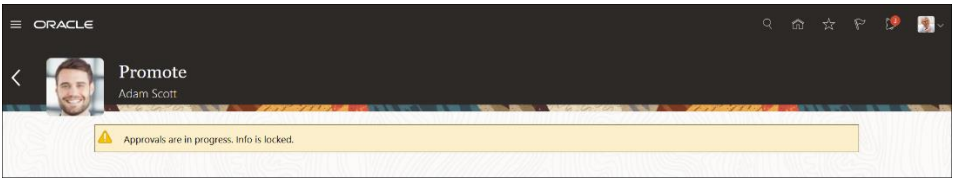
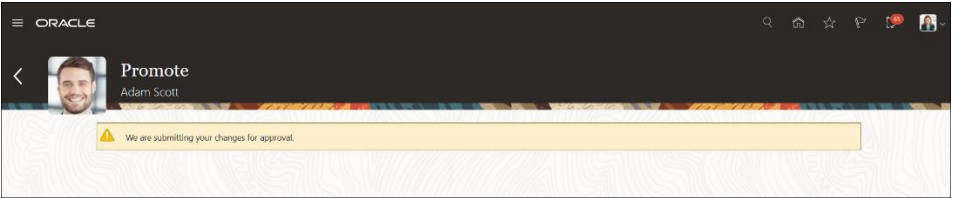
## Business Benifit:

- The synchronization for contact relationship start date with the worker's hire date will improve the user experience.



# Improved user experience for in-progress employment approval notification

- You can enhance user experience in employment approval notifications for in-progress transactions by providing consistent patterns, banners, and messages.



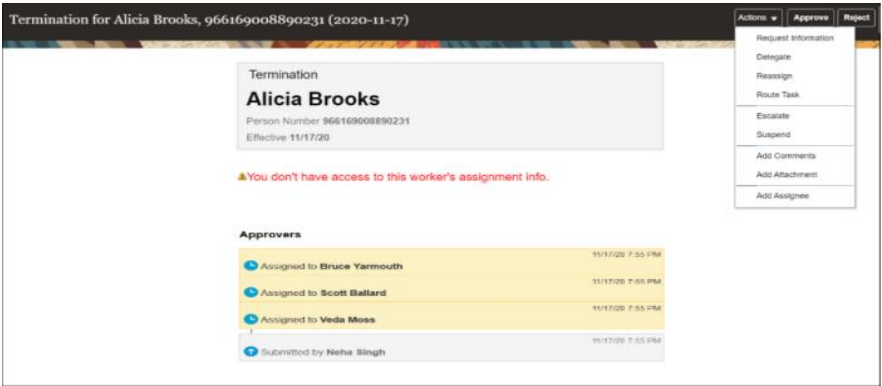
Impact Analysis	
Impact Level	LOW
Need to Enable	NO
Configuration	NO
Quick Win	YES

## Business Benifit:

- Initiators can track the approval status of their in-progress employment transactions by using consistent patterns, banners, and messages.

# Edit by approver action secured in BIP employment notifications

- We have secured editing of transactions by approvers
- The approvers are not allowed to edit the transaction if they don't have relevant function privilege or data access to the worker.
- This change is applicable for all employment processes.



Impact Analysis	
Impact Level	LOW
Need to Enable	NO
Configuration	NO
Quick Win	YES

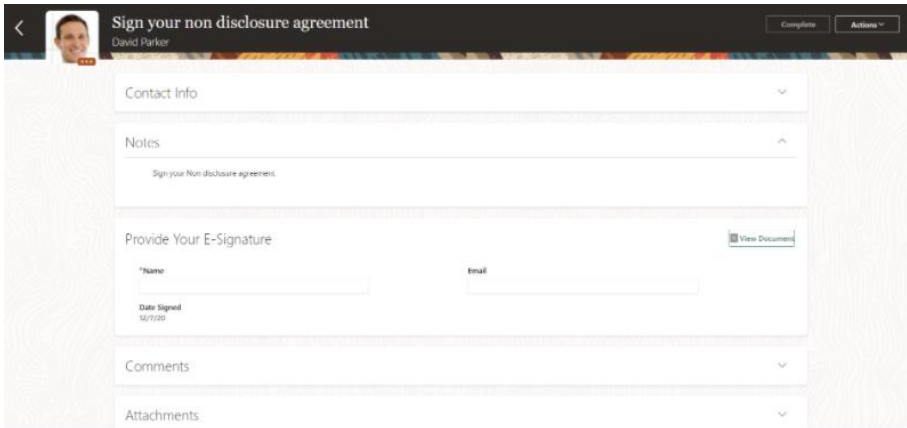
## Business Benifit:

- Improve your security for employment notifications by disabling the Edit button based on function and data access to the worker.



# Restrict IP Address Display in native electronic signature checklist tasks

- You can protect the confidentiality of electronically signed documents as the display of the IP address is restricted both in the responsive and Journey's task pages.



**Business Benifit:**

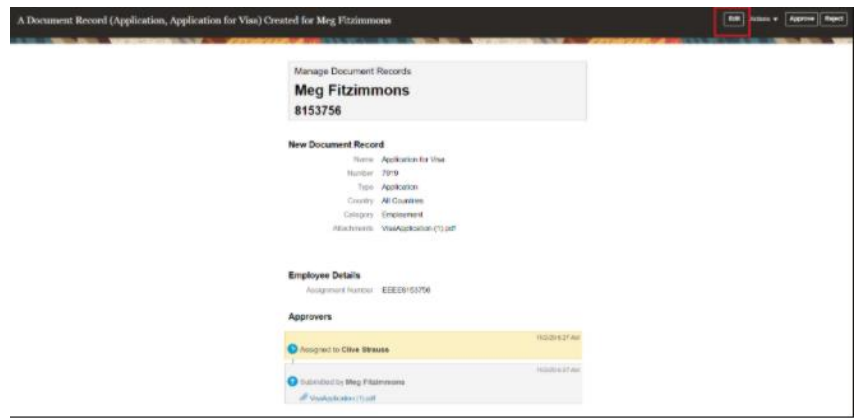


## Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	NO
Quick Win	YES

# Flexibility for approver to edit document record submitted for approval

- Approvers of a document record transaction now have the flexibility to edit a submitted document record instead of rejecting it.



## Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	NO
Quick Win	YES

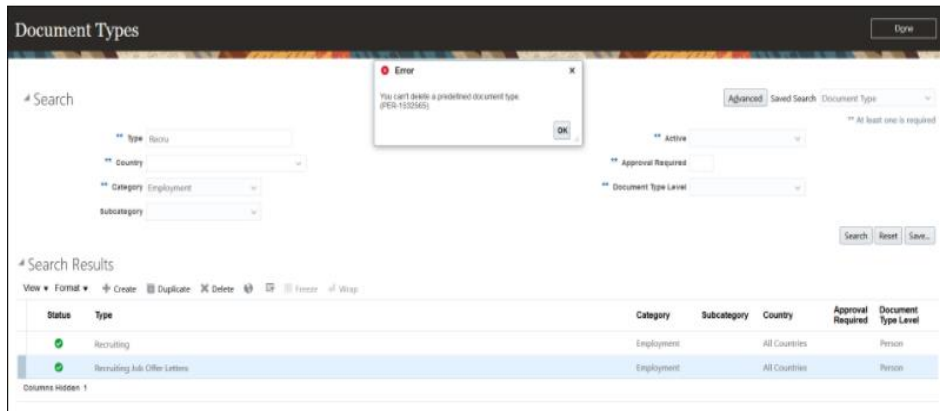
### Business Benifit:

- Avoids duplication of effort in recreating and submitting the rejected or withdrawn document record.



# Restrict deletion of seeded document types

- Deletion of predefined document types is now restricted even if there are no document records created for that document type.
- Also, leading and trailing spaces in Document Type name are automatically removed when configuring a new document type.



## Business Benefit:

- Control errors with consistent setup data for Document Types.

## Impact Analysis

Impact Level **LOW**

Need to Enable **NO**

Configuration **NO**

Quick Win **YES**



# Improved layout of document type setup page

- It's now easy to configure document types in the improved Document Types setup page
- Information is logically grouped in tabs thereby enhancing the layout and making for a better user experience.

Document Type information

System Document Type: **QUR PASSPORT**

Document Type Level: **Passport** | Assignment

Type: **Passport**

Description:

Expiration Notification Period: **30**

\*Minimum Attachments: **0**

Report Path:

Country: **All Countries**

Category: **Passport Information**

Subcategory:

\*Status: **Active**

\*Approval Required: **No**

\*Allow Multiple Occurrences: **No**

Publish Required: **No**

Enable Document Delivery Preferences: **No**

Override Hierarchy: **General**

**Document Record Preferences** | Additional Information | Document Delivery Preferences | Attachments

**Document Record Preferences**

Restrict Create: **No**

Restrict Update: **No**

Restrict Delete: **No**

**Attributes**

Name	Relevant	Required
Document No.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Document No.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
From Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## Impact Analysis

Impact Level **LOW**

Need to Enable **NO**

Configuration **NO**

Quick Win **YES**

## Business Benefit:

- Enhance your users experience and get better organization of information.



# Updated return navigation of deep links for document records and document delivery preferences

- Use the simplified return navigation in the document records and document delivery preferences deep links.
- When you launch these links from Me, My Team, or My Client Groups they now return to Personal Info, My Team, and Directory respectively.

## Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	NO
Quick Win	YES

## Tips and considerations

- If you are using the 'DOCUMENT\_RECORDS,NONE' or 'EMP\_DOC\_DELIVERY\_PREF,NONE' deep link for employees and they don't have access to Personal Info, then the deep link will not work.



# Control document records access in otbi

- You can now control access to person and document records data in OTBI reports using the new secured HR\_DOR\_REPORTING\_LIST\_V view implemented in the Document of Records Realtime subject area.

## Business Benefit:

- This feature allows for consistent security results when accessing document records for workers.



## Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	NO
Quick Win	YES

# Locations: conversion of time zone code and geographic hierarchy fields to client side list of values

- Time Zone Code and Geographic Hierarchy fields are now converted to client-side list of values (LOVs) in the Location Details responsive pages.
- Now, you can see the time zone code and the time zone offset.

Create Location

\*Country

United States

\*Address Line 1

Address Line 2

Address Line 3

\*ZIP Code

Select a value

\*City

Select a value

Address Line 4

Time Zone Code

KOL

Time Zone Code

Time Zone

Asia/Kolkata

(UTC+05:30) Kolkata - India Time (IT)

Email

Geographic Hierarchy

Main Phone

Country Code

Area Code

Local Number

Extension

## Impact Analysis

Impact Level

LOW

Need to Enable

NO

Configuration

NO

Quick Win

YES

## Business Benefit:

- You can now enter a search term in these LOVs to easily find the matching results.



## NEW FEATURES

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## QUICK WINS – Default with YES Configuration

# Ease of configuring reference regions in employment guided processes

- We have made it easier for you to configure the reference regions in employment guided processes
- You can now include read-only regions, such as **Seniority Dates** and **Need Help? Contact Us** in the newly added region named Reference Info Regions. You can select **Reference Info Regions** from the Page Attributes section in HCM Experience Design Studio.

Show or Hide Regions

When and Why

Visible

Enter Resignation Info

Visible

Reassign Existing Reports

Visible

Document Records

Not visible

Comments and Attachments

Visible

Additional Content

Not visible

Page Attributes

Region

Reference Info Regions

Need Help? Contact Us.

Visible

Seniority Dates

Visible



### Business Benefit:

- You can easily show or hide the read-only reference information sections.

Impact Analysis	
Impact Level	LOW
Need to Enable	NO
Configuration	YES
Quick Win	YES



## NEW FEATURES

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## QUICK WINS – Opt Ins



# Move future assignment updates during legal employer change

- You can use a profile option `ORA_PER_CLE_COPY_FUT_ASG` to control moving future assignment updates to the new assignment created as part of a legal employer change done using the Local and Global Transfer flow.
- You can control moving future assignment updates to the new assignment using the Mass Legal Employer Change flow by selecting the Copy future assignment updates check box.
- The `ORA_PER_CLE_COPY_FUT_ASG` profile option has no impact on the Mass Legal Employer Change flow.

## Impact Analysis

Impact Level **HIGH**

Need to Enable **YES**

Configuration **NO**

Quick Win **YES**

The screenshot shows the 'Create Mass Legal Employer Change' form with three steps: 1. When and Why, 2. Override Assignment Values, and 3. Additional Changes. In step 3, under the 'Assignment' section, there is a dropdown menu for 'Which extensible contexts do you want to copy?' set to 'All'. Below this, there are two checkboxes: 'Move future termination from source to new work relationship' (checked) and 'Copy future assignment updates' (checked and highlighted with a red box). Under the 'Salary' section, there is a checkbox 'Copy salary to the new assignment?' which is also checked. Under the 'Performance Goals and Documents' section, there is a dropdown menu for 'Which review periods do you want to include?' set to 'All Review Periods'. At the bottom right of the form is a green 'Continue' button.

# Control moving of future termination during legal employer change

- You can use a profile option to control moving a future termination to the new work relationship created as part of a legal employer change done using the Local and Global Transfer flow.
- You can control moving a future termination to the new work relationship using the Mass Legal Employer Change flow by selecting the Move future termination from source to new work relationship check box.

## Impact Analysis

Impact Level **HIGH**

Need to Enable **YES**

Configuration **NO**

Quick Win **YES**

The screenshot shows the 'Create Mass Legal Employer Change' form, step 3: Additional Changes. The form is divided into three main sections: Assignment, Salary, and Performance Goals and Documents. The Assignment section has a dropdown menu for 'Which endurable contents do you want to copy?' with 'All' selected. Below this, there are two checkboxes: 'Move future termination from source to new work relationship' (highlighted with a red box) and 'Copy future assignment updates'. The Salary section has a checkbox 'Copy salary to the new assignment?' which is checked. The Performance Goals and Documents section has a dropdown menu for 'Which review periods do you want to include?' with 'All Review Periods' selected. At the bottom of the form is a green 'Continue' button.

# Retain user changes in employment flows while changing effective date

You can now retain your employment and person changes in these employment flows even though you change the effective date:

- Local and Global Transfer
- Create Work Relationship
- Convert Pending Worker
- Add Assignment
- Change Location
- Promote
- Transfer
- Change Assignment

**Note:** In this release, person changes will be retained only in the Local and Global Transfer flow and no other employment flows.

## Impact Analysis

Impact Level	LOW
Need to Enable	YES
Configuration	NO
Quick Win	YES

## Business Benefit:

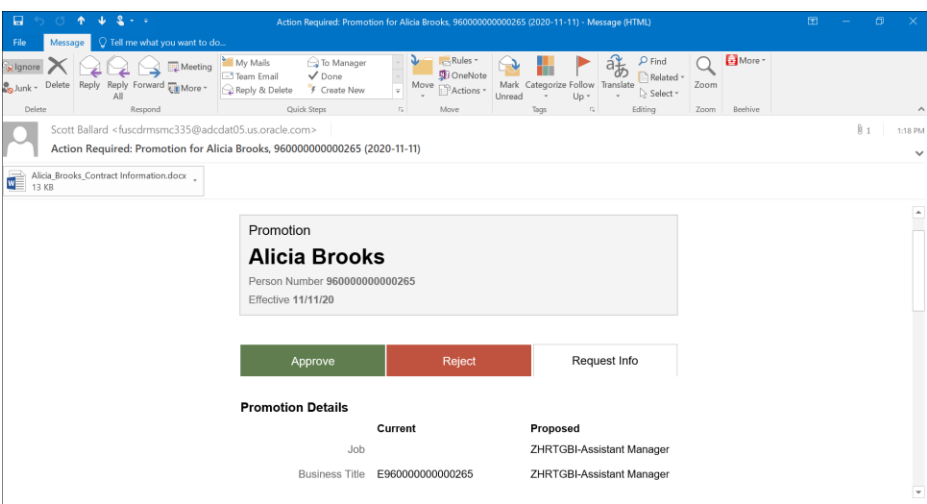
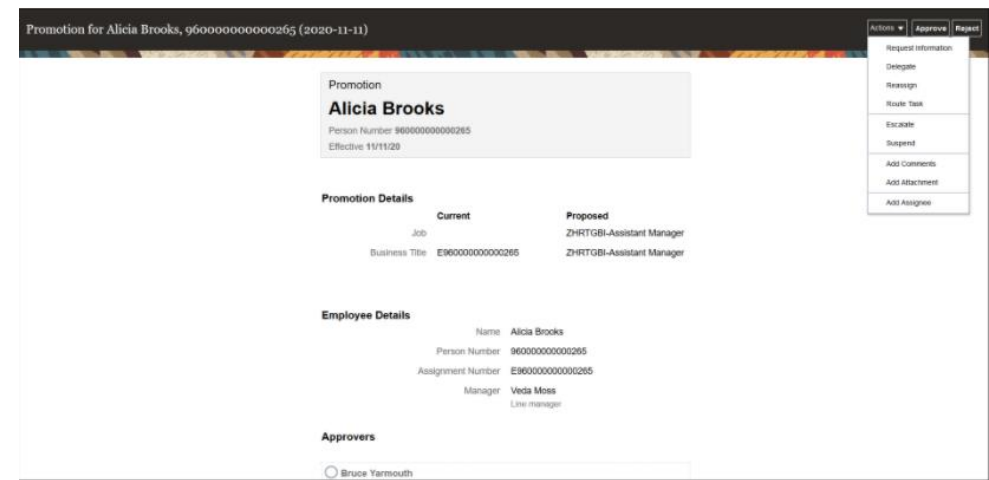
- Retaining the changes will reduce time and insure accuracy.





# Request for information from bip employment notifications

- You can request information from the initiator, other approvers, or any worker outside of the approval chain by using Request Information action under the Actions menu in the online BIP notification.
- For email BIP notification, you can request information by sending email only to the initiator. The initiator will get a BIP notification where they can provide the information



Impact Analysis

Impact Level	HIGH
Need to Enable	YES
Configuration	NO
Quick Win	YES

Any attachment that's added during request for information, or while submitting information is accessible to the approver in online and email notifications.

## Business Benefit:

- You can easily request and supply information using approval notifications.



# Add worker identification information in the page header of employment flows

- We have improved usability of the page header in employment flows by enabling worker identification information, such as person number, assignment number, and business title.
- An example where the employee name and assignment number are enabled in the page header:



## Business Benefit:

- The page header gives more information about the worker, in addition to the worker name.

Impact Analysis	
Impact Level	LOW
Need to Enable	YES
Configuration	NO
Quick Win	YES



## Enhanced configuration option to store document records for task performer or checklist assignee

- Store data accurately by configuring the option which enables you to store attachments, electronically signed documents, and reports either for the task performer or checklist assignee.

*Name	Sign the agreement	Status	Active
*Sequence	1	Preceding Task	
Description		Eligibility Profile	
Required	<input checked="" type="checkbox"/>	Offset Days	0
Target Duration	2 Days	Performer Name	
Delay Duration		Owner Name	
Performer	Worker		
Owner	Initiator		
Task Type	Electronic Signature		
Signature Type	Electronic Signature - Native		
Report Path	/Custom/Human Capital Management/Onboarding/ESignDocumentReport.do?P_SIGN_DATE={SignDate}&P_SIGNER_		
Document Type	Other Employment	Documents Are For	
Documents Are For	Assignee		
Comments	Assignee		
Attachments	Performer		
Add Attachments to Document Records	Other Legal Document		
Attachments Are For	Performer		

### Business benefit:

- This feature allows you to control access to data and ensure data consistency.



## Impact Analysis

**Impact Level** **LOW**

Need to Enable	YES
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Configuration	NO
---------------	----

**Quick Win** **YES**

# Control task assigned notification for a task performer

- You can now control the notification that is sent to a performer when a task is assigned by modifying the notification settings for the task.

The screenshot shows a web interface for a 'Checklist: Promotion Journey'. Under the 'Task: Update skills and qualifications' section, there is a 'Notification Overrides' tab. A table lists notification events: 'task completed', 'task updated', 'When task is unassigned', and 'Task assigned or reassigned'. The 'Task assigned or reassigned' row is highlighted with a red box. Below the table, there is an 'Enable Reminder' checkbox and a 'Remind Every' field.

## Impact Analysis

Impact Level **LOW**

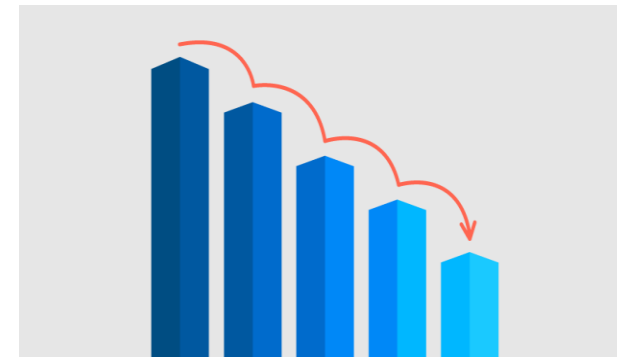
Need to Enable **YES**

Configuration **NO**

Quick Win **YES**

## Business Benefit:

- By using this feature you can reduce the number of task email notifications sent to the user.



# Prevent task performers from updating checklist task status directly from the notification

- You can prevent task performers from updating the checklist task status directly from the task notification now.
- Hide the Action for Task Performer

Task Property	Property Type	Performer	Owner	Line Manager	Other User	Actions
Task Access	Section	Allow	Hide	Hide	Hide	
Attachments	Section	Allow	Allow	Allow	Allow	
Comments	Section	Allow	Allow	Allow	Allow	
Contact Information	Section	Show	Show	Show	Show	
Notes	Section	Show	Show	Show	Show	
Mark a Task as Complete	Action	Show	Show	Show	Show	
Edit a Task Due Date	Action	Hide	Show	Hide	Show	
Edit a Task	Action	Hide	Show	Hide	Show	
Reassign a Task	Action	Hide	Show	Show	Show	
Mark a Task as Not Applicable	Action	Hide	Show	Show	Show	
Remove a Task	Action	Hide	Show	Hide	Show	
Reopen a Task	Action	Show	Show	Show	Show	

Task Assigned  
**David Parker**  
(955160008178429)

**Task Details**

Task Name: Add goals to reflect the new role

Task Description: Add goals to reflect the new role

Performer: David Parker, 955160008178429

Owner: King Performance, 955160008178429

Required: No

Status: Initiated

Start Date: November 5, 2020

Due Date: November 7, 2020

URL: ClubLink

Impact Analysis

Impact Level	LOW
Need to Enable	YES
Configuration	NO
Quick Win	YES

## Business Benefit:

- Restricts users from marking a task as complete directly from the task notification without actually visiting the task.



PROCESS  
CONTROL

# Classify document types as person-based or assignment-based

- It's now possible to specify for each document type if document records created for that document type are applicable for a person or an individual assignment of the person.

**Edit Document Type: Employment Agreement**

Document Type Information

System Document Type: GUS\_EMPLOYMENT\_AGREEMENT

Country: All Countries

Category: Employment

Subcategory:

Document Type Level: **Person** **Assignment**

Type: Employment Agreement

Description:

Expiration Notification Period:

\*Minimum Attachments:

Report Path:

\*Approval Required: ☐ No ☒ Yes

\*Allow Multiple Occurrences: ☐ No ☒ Yes

Publish Required: ☒ No ☐ Yes

Enable Document Delivery Preferences: ☒ No ☐ Yes

Buttons: Printable Page, Save, Submit, Cancel

## Business Benefit:

- With this feature you will now have security at the assignment level.

## Impact Analysis

Impact Level **LOW**

Need to Enable **YES**

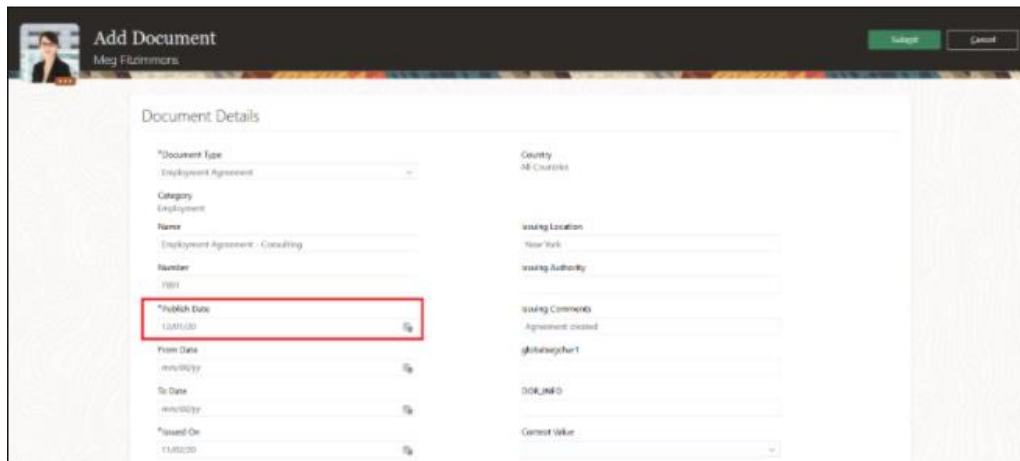
Configuration **NO**

Quick Win **YES**



# Specify publish date when adding document records

- Use the Publish Date field on the Add Document Records page to publish document records from a specific date.
- If Publish Required is set to **Yes** when you configure the document type, the **Publish Date** field displays on the Add Document Record page as a required field.



**Add Document**  
Meg Filmonera

**Document Details**

\*Document Type: Employment Agreement  
Country: All Countries  
Category: Employment  
Name: Employment Agreement - Consulting  
Number: 7801  
\*Publish Date: 12/01/20  
From Date: 10/01/2020  
To Date: 10/01/2020  
Issued On: 11/02/20  
Issuing Location: New York  
Issuing Authority:  
Issuing Comments: Agreement created  
glovesgchar1  
DOCUMNT ID:  
Current Value:

## Impact Analysis

Impact Level **LOW**

Need to Enable **YES**

Configuration **NO**

Quick Win **YES**

## Business Benefit:

- You now have the ability to track from when a document record is available.



# Ability to include instructional attachments for document types

- You can now leverage the ability to add instructional attachments on the Document Types setup page for users to download and use as reference.

## Impact Analysis

Impact Level **LOW**

Need to Enable **YES**

Configuration **NO**

Quick Win **YES**

**Edit Document Type: Passport**

Document Type Information

System Document Type: OLS\_PASSPORT

Document Type Level: ☒ Person ☐ Assignment

Type: Passport

Description:

Expiration Notification Period: 30

\*Minimum Attachments: 0

Report Path:

Document Record Preferences: **Attachments**

\*Attachments

Type	*File Name or URL	Title	Description	Attached By	Attached Date
File	Sample Passport.jpg Update...	Sample Passport	Sample Passport Copy	Mag Fitzmaurice	11/01/20 9:41 PM

**Add Document**

Ravi Chouhan

Document Details

\*Document Type: Passport

Category: Passport Information

**Reference Info**

Sample Passport.jpg (199.92 KB)

Name:

Number:

From Date: mm/dd/yy

To Date: mm/dd/yy

Issued On: mm/dd/yy

Issuing Country:

Preview: Sample Passport - Last updated 11/02/20 9:40 AM

globalengchar1

DOR\_INFO

Context Value

## Business Benefit:

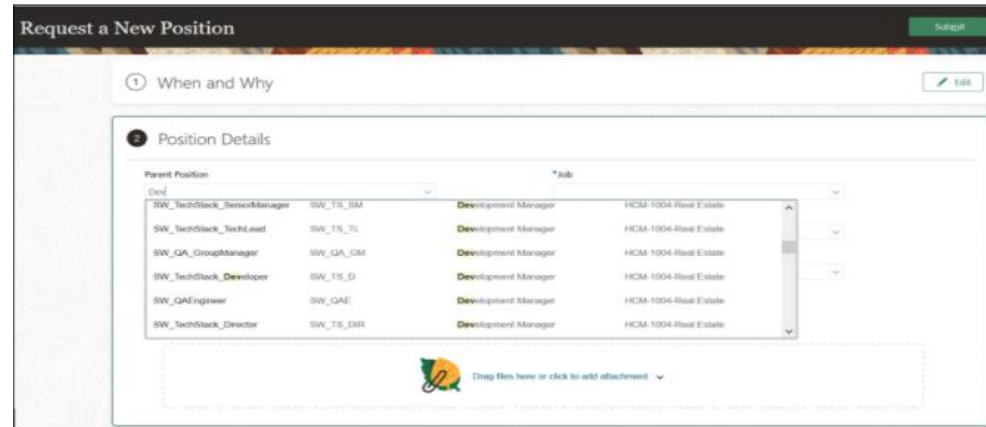
- With this feature you now have the ability to share instructions or sample documents to help end-users create accurate and relevant document records.





# Oracle search support for position list of values

- You can search on these attributes by providing parts of the word, full word, or the middle of the word and appropriate results will be displayed.
  - Position Code
  - Position Name
  - Job Name
  - Department Name



Parent Position	Job	Department
SW_TechStack_SensorManager	SW_TS_SM	Development Manager
SW_TechStack_TechLead	SW_TS_TL	Development Manager
SW_GA_GroupManager	SW_GA_GM	Development Manager
SW_TechStack_Developer	SW_TS_D	Development Manager
SW_GA_Engineer	SW_GAE	Development Manager
SW_TechStack_Director	SW_TS_DR	Development Manager

## Impact Analysis

Impact Level **LOW**

Need to Enable **YES**

Configuration **NO**

Quick Win **YES**

## Business Benefit:

- The positionLovV2 REST resource improves your search experience where position LOV is shown.

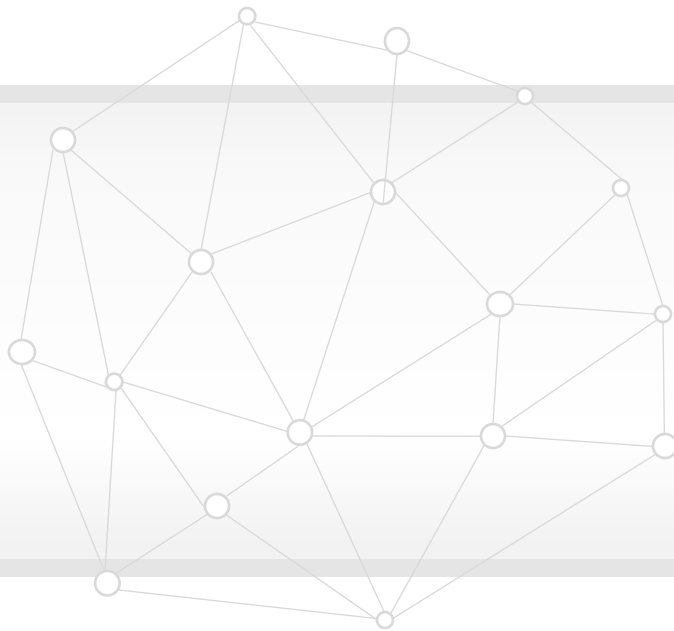


**Oracle's Global  
Partner of Year  
(2017, 2019)**

- Featured in Gartner  
MQ for Oracle Cloud  
(2019, 2020)

Impact Level	LOW
Need to Enable	YES
Configuration	NO
Quick Win	YES

- The departmentLovV2 REST resource improves your search experience in the position responsive pages where the Department LOV is shown.



## NEW FEATURES

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## The Rest





## HCM COMMON FEATURES

---



# Business object enhancements

## Details:

- Extend your data loading capabilities with these new and enhanced business objects
- New Business Objects: Global Payroll
- Business Object Hierarchy Changes: Global payroll, Recruiting.
- Business Object Attribute Changes: Absence Management, Compensation, Global HR, Global Payroll, Recruiting, Talent Management

## Business Benefit:

- You can extend your integration coverage and bulk loading capabilities.



## Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	YES
Quick Win	NO

# Remove person information enhancements

- We now have a separate privilege for the Report mode (ORA\_HRC\_GENERATE\_REMOVE\_PERSON\_INFORMATION\_FILE).
- Having this privilege alone grants the user access to the Report mode only.
- The existing privilege, ORA\_HRC\_REMOVE\_PERSON\_INFORMATION grants access to both remove and report modes.

## Steps to Enable

- Make the feature accessible by assigning or updating privileges and/or job roles.

## Business Benefit:

- Granting access to the report mode only lets you have flexibility over the user's privileges.

## Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	YES
Quick Win	NO



# Secured business objects now available to business users

- Extend your business users' bulk-loading capabilities for an object.
- Spreadsheets based on these objects now implement the user's data security and can be shared with business users.

## ***Global Payroll***

- Calculation Card

## **Business Benefit:**

- Your business users can bulk load data for these objects using spreadsheets.



## Impact Analysis

Impact Level	LOW
Need to Enable	YES
Configuration	NO
Quick Win	NO

# Purge HCM extracts archive data using remove person information feature

- You can clean-up the extracts generated archive data, when running the Remove Person Information process for an ex-employee, by selecting the 'Extracts Archive' from the list of available business objects.

## Business Benefit:

- You no longer need to retain data for terminated or canceled employees.



## Impact Analysis

Impact Level

HIGH

Need to Enable

NO

Configuration

YES

Quick Win

NO



# Protect oracle delivered hcm extracts from edits

- For delivered or seeded extracts, users cannot edit the extract.
- Make a copy of the delivered extract to change or add a parameter.
- Instead of creating the extract definition again, you can now make a copy of the seeded or delivered extract and make your changes.

**Business Benefit:**

**Better**  
CONTROL



Impact Analysis	
Impact Level	LOW
Need to Enable	NO
Configuration	YES
Quick Win	NO

# Hidden attributes in business objects for configure business objects and autocomplete rules

- The Configure Business Objects and Autocomplete Rules tasks have been streamlined with changes in the business objects and related attributes.
- Deprecated business objects are removed and a few attributes are hidden in the respective business objects.
- The attributes won't be available in manual groovy in the Configure Business Objects task and logic rules in Autocomplete Rules pages.
- Hence, manual groovy and logic rules must be reviewed for each impacted business object.

Impact Analysis	
Impact Level	HIGH
Need to Enable	NO
Configuration	YES
Quick Win	NO

## Business Benefit:

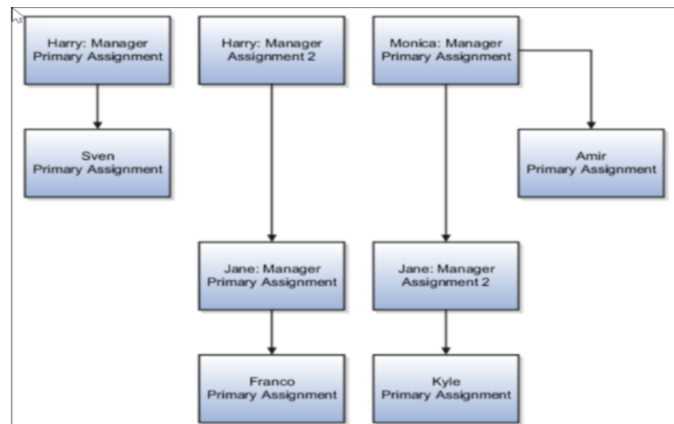


# Secure access for workers with multiple assignments

- We continue to enhance the HCM footprint for securing user access for workers by using assignment-level security, if your organization allows them to have multiple assignments
- This is the second feature release of a multi-phased implementation for HCM Cloud customers.
- This release provides further enhancements to Absence Management, Document Records, Global HR OTBI Reporting, Performance, and Personal Payment Methods from the Payroll product area.
- The respective HCM quick actions and person searches have been modified to provide a broader and more consistent user experience for organizations with multiple assignments. .

## Impact Analysis

Impact Level	LOW
Need to Enable	YES
Configuration	YES
Quick Win	NO



## Business Benefit:



# Atom feeds for additional HCM transactions

- HCM Atom feeds provide notifications of Oracle Fusion Human Capital Management (HCM) events and are tightly integrated with REST services.
- The *empupdate* and *empassignment* Atom feeds are now triggered when additional person and employment attributes are updated.
- You can subscribe to these feeds to receive updates for Oracle HCM Cloud transactions.

## Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	YES
Quick Win	NO



## GLOBAL HR

---



# Bypass approvals for specific change personal information sub processes

- Configure your Change Personal Information approval rule so that specific change personal information sub processes bypass the approval process.
- When you bypass or allow approvals for the parent process, the same applies for the sub processes too.

Transaction Manager: Rules	
Find change personal inform	
Process Name	Bypass Approvals
Change Personal Information	
Change Personal Information: Address	
Change Personal Information: Biographical Info	
Change Personal Information: Citizenship	
Change Personal Information: Contact Relationship	
Change Personal Information: Create a New Contact	
Change Personal Information: Demographic Info	
Change Personal Information: Disability Info	
Change Personal Information: Driver's Licenses	
Change Personal Information: Email Details	
Change Personal Information: Name	
Change Personal Information: National Identifiers	
Change Personal Information: Other Communication Accounts	
Change Personal Information: Passports	
Change Personal Information: Person Number	
Change Personal Information: Phone Details	

## Business Benefit:



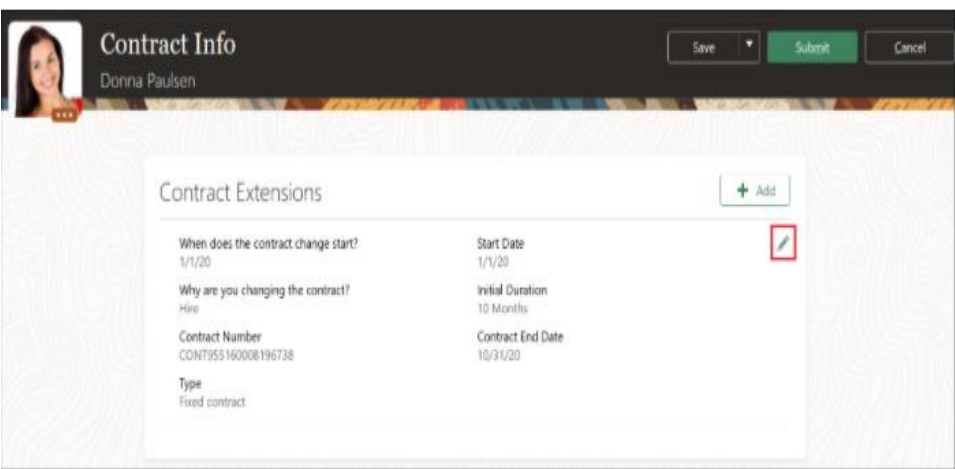
- This change improves your employee experience and simplifies your approval definition.

## Impact Analysis

Impact Level	HIGH
Need to Enable	NO
Configuration	YES
Quick Win	NO

# Date effective updates supported in responsive employment contracts

- We have improved your ability to capture data by using effective dated updates in the responsive employment contracts page.
- To add an effective dated row, you need to:
  - Click the Edit icon.
  - Change the contract start date for an effective dated update. If you don't change the start date, then it's considered as a correction.



- You can also add the action on the employment contract user interface.
- We have enhanced the action framework so that you can mark which actions should be visible on the responsive employment contracts user interface.

1

Action

Code

CONTRACT\_EXTENSION

\*Name

Contract Extension

Description

Contract Extension

Type

Extend Employment Contract

Used in Contract

Yes

## Business Benefit:

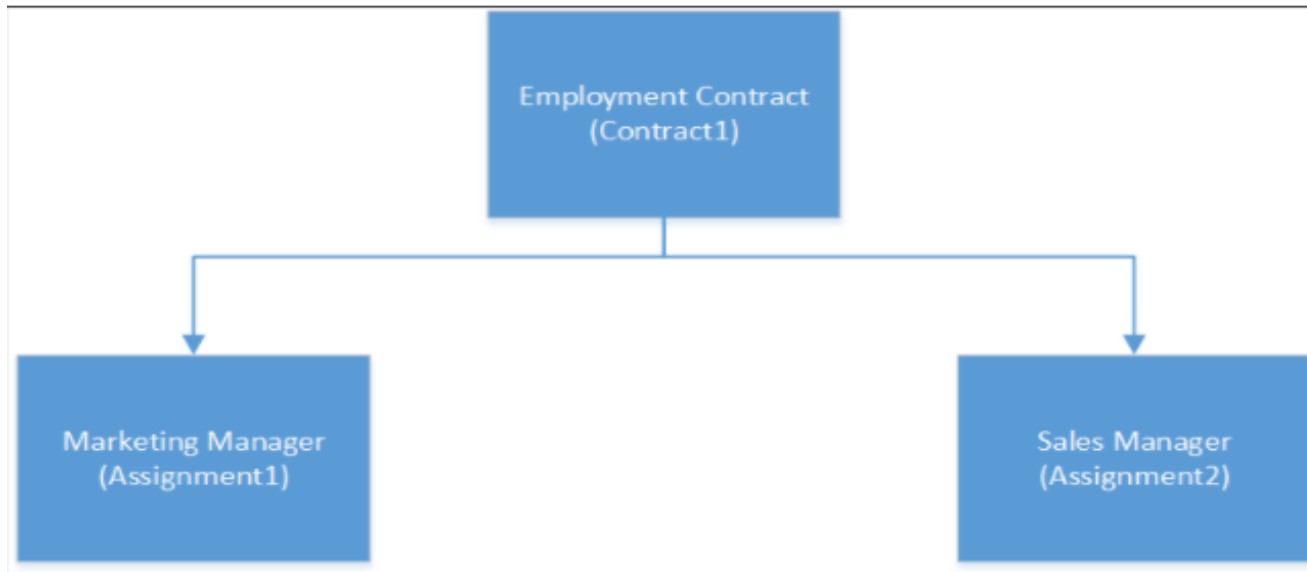
Capture data related to employment contracts from the responsive page by using effective dated updates and track the updates using the action framework.

Impact Analysis

Impact Level	HIGH
Need to Enable	YES
Configuration	YES
Quick Win	NO

# Share employment contract when adding assignments using hdl

- You can share the employment contract while adding a new assignment using HCM Data Loader (HDL) and HCM Spreadsheet Data Loader (HSDL).
- You can share employment contracts when adding new assignments using HDL and HSDL.



## Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	NO
Quick Win	NO



# Audit the transactions done using responsive employment pages

You can track your employment changes made using the responsive user interfaces by leveraging the audit capability.

These business objects are enabled for audit:

- Work Relationship
- Work Assignment
- Work Term
- Work Term Contract
- Assignment Extra Information
- Worker Assignment Supervisor
- Worker Assignment Work Measure
- Worker Assignment Grade Step
- Working Hour Pattern
- Seniority Dates

## Business Benefit:

- Audit employment changes done using the responsive user interfaces which was earlier only possible for changes done using classic user interfaces.

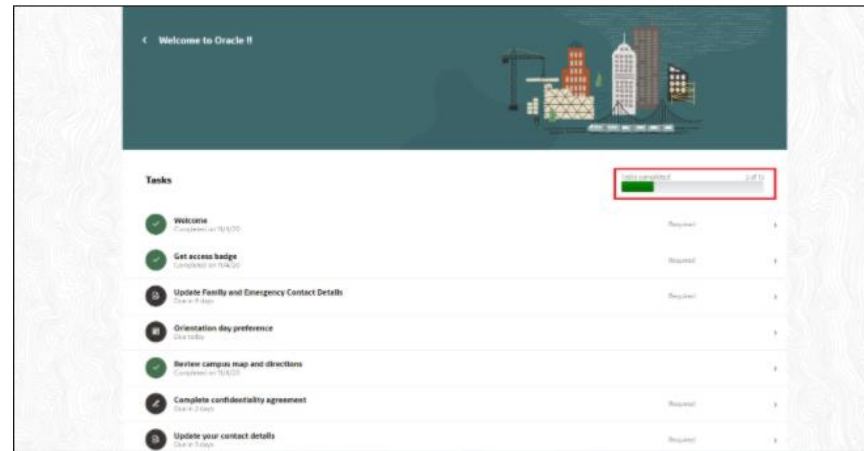
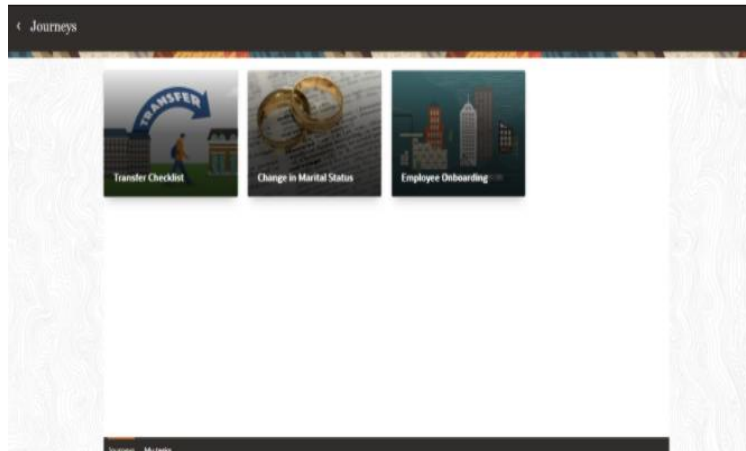
## Impact Analysis

Impact Level	HIGH
Need to Enable	YES
Configuration	NO
Quick Win	NO



# Embark on journeys

- You can now use Journeys to guide employees during their personal and professional transitions.
- Irrespective of the checklist category, Journeys enables all stakeholders involved in a journey to track and manage their tasks effectively in a single consolidated application.
- Embark on journeys and provide a unique user experience.



## Impact Analysis

Impact Level **HIGH**

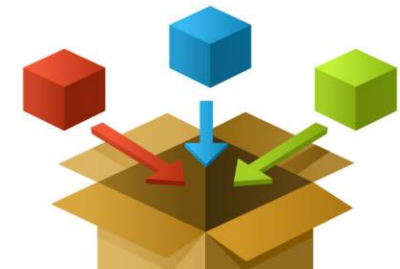
Need to Enable **YES**

Configuration **NO**

Quick Win **NO**

## Business Benefit:

- This creates a single consolidated user interface to manage all checklists and ease in performing tasks.



# Route document record approvals using current assignment hierarchy

- You can now configure your approval rules and route approvals using the current assignment hierarchy for document records.
- The default routing uses the primary assignment hierarchy, but now you can route approvals to nonprimary assignment managers as well.

Approval Rules: Manage Document Records: DocumentOfReco... [Edit Approval Participants](#) [Save](#) [Submit](#) [Cancel](#)

IF  Subject THEN  Management Hierarchy

Management Hierarchy

Assignment ☒ Use primary assignment hierarchy ☐ Use current assignment hierarchy

Top Approver: Second Level Manager

Start With: Manager

Number of Levels: 2

Action Type: Approval required

Route Using: Line manager

Approval Chain: OR

Workers

Users

## Impact Analysis

Impact Level **LOW**

Need to Enable **NO**

Configuration **YES**

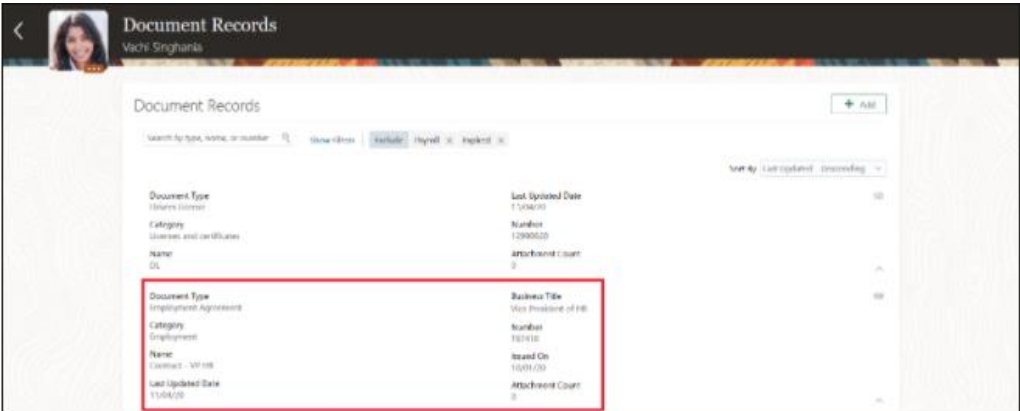
Quick Win **NO**

**Business Benefit:**



# Document records displayed based on assignment access when assignment-level security is configured

- You can now display document records based on assignment access.
- When assignment-level security is enabled the document records landing page user interface displays these records:
  - Document Records based on document types which are configured as person-based **and**
  - Document Records based on document types which are configured as assignment-based but don't have Assignment ID stored against those document records **and**
  - Document Records based on document types which are configured as assignment-based and have Assignment ID matching the list of Assignment IDs the user has access to.



## Business Benefit:

- With this feature you can control data access and ensure data security is maintained.



## Impact Analysis

Impact Level	HIGH
Need to Enable	YES
Configuration	NO
Quick Win	NO

# Support for flexfields in document types

- Make use of newly added document type descriptive flexfields to record custom attributes for document types.

Sequence	Name	Table Column	Value Set	Enabled	Prompt
10	Document Type Global Segment	DT_ATTRIBUTE1	10 Characters	✓	Additional Details

## Impact Analysis

Impact Level **HIGH**

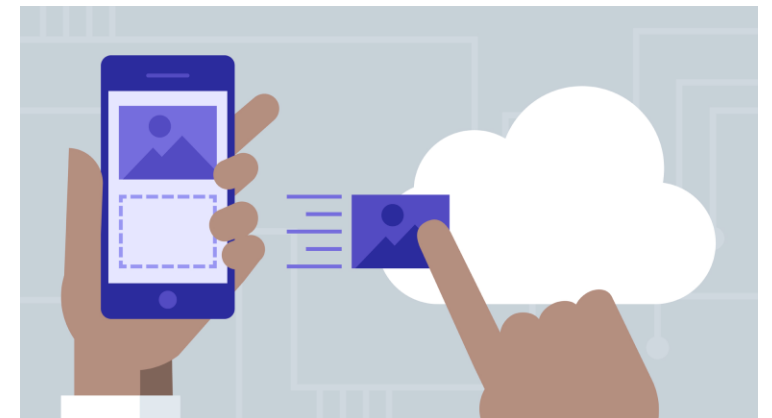
Need to Enable **NO**

Configuration **YES**

Quick Win **NO**

## Business Benefit:

- Store custom attributes for document types like retention period.



# ADDITIONAL SEGMENTS ADDED TO DOCUMENT RECORD FLEXFIELD

- You can use the increased size of user-defined descriptive flexfields (DFFs) and developer flexfields (DDFs) to include more information about document record attributes.

Flexfield Name: Documents of Record Attributes  
Flexfield Code: PER\_DOCUMENTS\_OF\_RECORD\_DFF  
Segment Code: Description of Incident  
Value Set: PER\_DOC\_4000  
Value Set Description: 4000 characters  
Display Properties: Prompt: Description of Incident, Display Type: Text Area  
Column Assignment: Data Type: Character, Table Column: DE\_ATTRIBUTES1  
Range Type: Required

## Impact Analysis

Impact Level

LOW

Need to Enable

NO

Configuration

YES

Quick Win

NO

## Business Benefit:

- Expand your data capture with the add segments for document types and large text descriptions for document record flexfield attributes.



# New rest resource for geographic hierarchy

- You can now use the geographicHierarchiesLov REST resource to view geographic hierarchies.

## Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	YES
Quick Win	NO

## Business Benefit:

You can easily search for geographic hierarchies.



## NEW FEATURES

---

## OTBI Enhancements





# HR Optimizations

## Attributes renaming across hcm otbi subject areas

- Streamline your reporting on HCM OTBI subject areas with more meaningful attribute names across multiple subject areas.

## Additional attributes to hr action and hr action reason dimensions

- Improve your reporting on HR Actions and HR Action Reasons with the inclusion of new attributes.
- The following dimensions have been removed from Workforce Management - Workforce Trend Real Time subject area
- HR Action
- HR Action Reason

## Assignment level security enhancement to vacancy real time subject area

- Improve your reporting on the Vacancy Real Time subject area with the ability to report on assignment level security.
- With this enhancement, if the assignment level security feature is enabled in the system, then line managers would be able to report on vacancies that pertain to their assignment hierarchy.

### Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	YES
Quick Win	NO



## REPLACED OR REMOVED FEATURES

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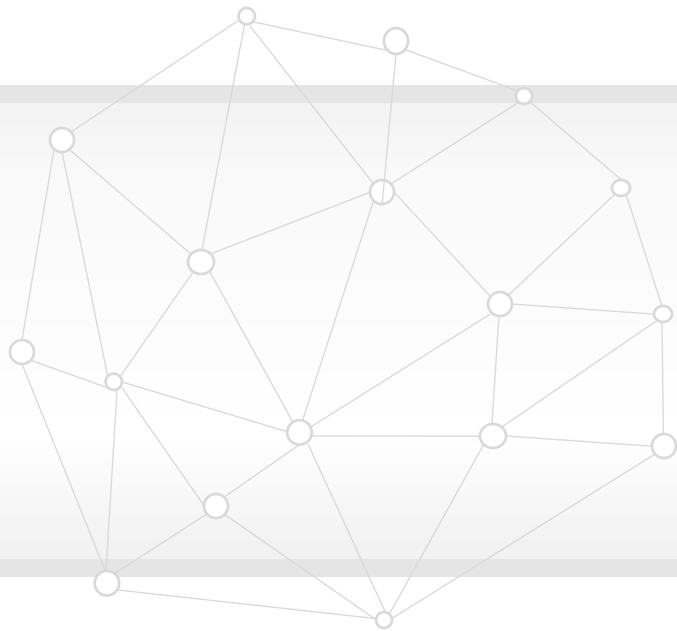
# Change legal employer to be replaced with local and global transfer flow in update

Start using the responsive Local and Global Transfer flow introduced in release 19A. These are the key features available only in the Local and Global Transfer flow:

- Managing assignment extensible flexfields
- Managing enhanced payroll information and copy options
- Managing performance goals and documents copy options
- **Note:** This is an update to the announcement made in the release 20B What's New that the Change Legal Employer feature will be replaced in release 20D.

## Impact Analysis

Impact Level	HIGH
Need to Enable	YES
Configuration	NO
Quick Win	YES



## KNOWN ISSUES

---



# Limitations on creating document records from document tab

## Details:

- If a document type has been configured to have minimum attachments (greater than zero), then users can't add a document type from the Documents tab in the Manage Person page.
- When users click Create in the attachments section, the error message "For the selected document type, you must upload the following minimum number of attachments: {MIN\_NUM}" displays.
- The Add Attachment action works fine for document types which don't have the minimum attachments configuration.

## Workaround:

Use the Document Records quick action to create and update document records.

Oracle Reference: 32038623

# Document records rest API doesn't validate mismatch between attachment type

## Details:

- When using REST API to load document record attachments, if there's a mismatch between the attachment type and content this isn't validated.
- For example, if you specify the attachment type as text/plain but provide the contents as a Word document or vice versa, the system doesn't validate the correct document.

## Workaround:

Ensure that the attachment type and content match when using REST API to upload document records attachments.

Oracle Reference: 29504714

**Issue existing since previous release**

# Personal information section hidden in classic manage direct reports page

## Details:

- The Personal Info section is hidden in the classic Manage Direct Reports page

## Workload:

This is to avoid duplication of information displayed on the page.  
However, you can display the section using Personalization.

Oracle Reference: 30312120

Issue existing since previous release

# Duplicate document record attachment names results in upload issue

## Details:

- An error occurs when uploading document record attachments with duplicate names in a single document record transaction.
- This is because SOA doesn't allow multiple attachments with the same name for a single task.
- This is what is observed:
  - When approval is enabled, it displays an error message in the Document Records page.
  - When bypass approval is enabled, there is no error message but, the document record doesn't get created.
  - When created using HDL or REST API, it saves the duplicate attachment as a blank file.

## Workload:

It is recommended not to upload multiple attachments with the same name.

Oracle Reference: 30898449

**Issue existing since previous release**

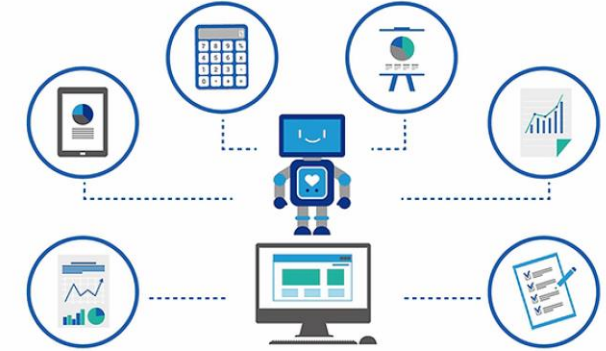
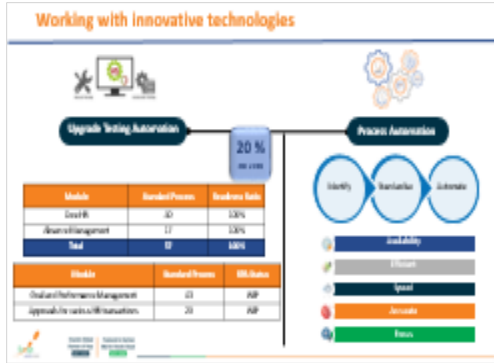




## Leveraging Technology

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# Leveraging other technology to enhance Oracle Cloud Applications



## RPA



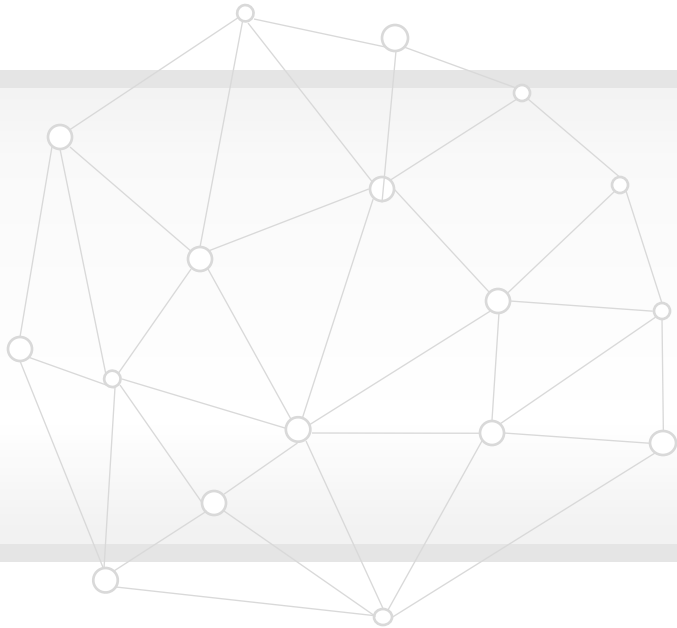
- ✓ **Significant time savings** using UiPath testing automation tool
- ✓ **Cycle testing robots** for cross module process cycles – P2P, Invoice to Pay, GL reconciliation
- ✓ Saved time and effort for identifying processes that can be automated to remove critical process bottlenecks

## Analytics

- ✓ **Value based Analytics**
  - ✓ Process Optimisation
  - ✓ System Adoption
  - ✓ Information Output
  - ✓ Audit & Compliance
- ✓ Enabling wider analytics and data utilization across the organisation.
- ✓ Combining data from across the business into 1 repository

## Chatbot

- ✓ Improve adoption of Oracle Cloud Apps technology as chatbot improves user experience and speed of transaction
- ✓ Utilize Knowledge Base to answer employee and customer queries
- ✓ Reduce learning curve of Oracle Fusion application



# Closing

---

## Q&A

# Closing Note

1. What happens next?
  1. Presentation
  2. Session Recording
  3. Test Scripts
2. Feedback Form
3. Speak with your Project Manager or [business@evosysglobal.com](mailto:business@evosysglobal.com)
  1. for additional services around quarterly updates
  2. Learn more about Innovation
4. Next Sessions →

19<sup>th</sup> January 2021




LIVE WEBINAR

Finance Advisory Session 21A Update

Recording available

20<sup>th</sup> January 2021



LIVE WEBINAR

Global Human Resource Quarterly Update 21A

Recording available

21<sup>th</sup> January 2021



LIVE WEBINAR

Talent Management Quarterly Update 21A

Register now

22<sup>th</sup> January 2021




LIVE WEBINAR

Workforce Management and Compensation Quarterly Update 21A

Register now

25<sup>th</sup> January 2021




LIVE WEBINAR

Supply Chain Management Quarterly Update 21A

Register now

25<sup>th</sup> January 2021




LIVE WEBINAR

HR Helpdesk & Oracle Recruiting Cloud

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LIVE WEBINAR

Global Payroll Quarterly Update 21A

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# Working with innovative technologies



## Upgrade Testing Automation

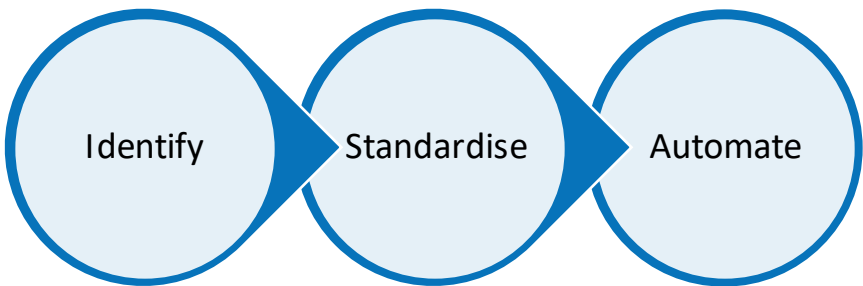
**20 %**  
20C v 20D

Module	Standard Process	Readiness Ratio
Core HR	40	100%
Absence Management	17	100%
Total	57	100%

Module	Standard Process	RPA Status
Goal and Performance Management	43	WIP
Approvals for various HR transactions	20	WIP



## Process Automation



Availability



Efficient



Speed



Accurate



Focus