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Getting Started with Oracle Fusion Applications: Common Implementation



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Warning

The tasks presented in this guide are intended for a quick introduction or pilot implementation. The guide does not include all the setup and security tasks that are appropriate for a complete implementation.

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Introduction

This guide provides a high-level overview of the key tasks that implementors perform to get started with an implementation of Oracle Fusion Applications. These are the first steps in the implementation process after installation and provisioning of Oracle Fusion Applications.

Warning: The tasks presented in this guide are intended for a quick introduction or pilot implementation. The guide does not include all the setup and security tasks that are appropriate for a complete implementation.

The guide covers the basic requirements needed to create an implementation project, optionally create initial implementation users, and set up the basic enterprise structure needed for implementing any and all Oracle Fusion Applications offerings.

References to related help for complete implementations accompany each of the steps. The help is available from Oracle Fusion Applications Help or <u>Oracle Fusion Applications Technology Library</u>, unless specified otherwise.

You can find this document (ID: <u>1387777.1</u>) on My Oracle Support, https://support.oracle.com.

Access Requirements

To get started with Oracle Fusion Applications implementation, you need access to Oracle Identity Manager (OIM), Oracle Authorization Policy Manager (APM), and Oracle Fusion Applications.

Before you begin, make sure you have the following information:

• URLs for Oracle Fusion Applications and OIM

For example, the Oracle Fusion Applications is <u>http://host/homePage/faces/AtkHomePageWelcome</u>, where *host* is the name of the host location such as abc.oracleoutsourcing.com.

If you do not know the URLs, contact the person who installed the systems at your company. When the Oracle Fusion Applications provisioning process completes, these URLs are shown on the summary page. They are also recorded in a file whose default name is Provisioning Summary. The person installing the software, however, has the option to choose a different file name. The file is created in the same location as the provisioning plan.

The user name and password of the Oracle Fusion Applications super user and the OIM system administrator user

The default user name of the Oracle Fusion Applications super user is **FAADMIN**. The default OIM system administrator user name is **XELSYSADM**. Contact the person who installed the systems for the actual user names and passwords specified during installation and provisioning.

 Location of the Oracle home directory in the Oracle Identity Management (IDM) environment (IDM_ORACLE_HOME)

You will need some familiarity with running UNIX commands.

Getting Started Process Flow

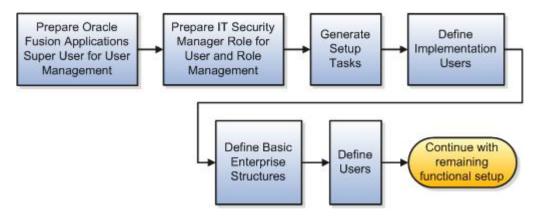


Figure 1: Process Flow for Starting Your Implementation of Oracle Fusion Applications Offerings

To start your implementation, follow the steps described below.

- 1. Preparing Oracle Fusion Applications Super User for User Management and Configuration
- 2. Preparing IT Security Manager Role for User and Role Management
- 3. Generating Functional Setup Task List
- 4. Defining Implementation Users
- 5. <u>Setting Up Basic Enterprise Structure</u>
- 6. Defining Users

After completing these initial tasks, continue with the remaining functional setup tasks of the offering you have chosen for your implementation project. See <u>Additional References</u> for information about getting started information for specific offerings.

Table 1: Preparing the Oracle Fusion Applications Super User for User Management and Configuration

By default the super user created when installing and provisioning Oracle Fusion Applications (for example, FAADMIN) is not set up with an e-mail address. User management and configuration requires that the super user has an e-mail address.

Tasks	Description	Documentation
Task 1: Update the Oracle Fusion Applications super user ID in LDAP (Oracle Internet Directory)	As a user with administrative privileges in the Oracle Identity Management (IDM) domain, run the following command from the Oracle home directory in that IDM environment:	"Preparing the Oracle Fusion Applications Super User for User Management and Configuration" in the <i>Getting Started and Security</i> section of the <u>Oracle Fusion Applications Release</u> <u>Notes</u>
	<pre>\$IDM_ORACLE_HOME /bin/ldapmodify -h oid_host -p oid_port -D "cn=orcladmin" -w password_for_orcladmin <<eof< pre=""></eof<></pre>	
	dn: dn_of_super_user_entry	
	changetype: modify	
	replace: mail	
	mail:e-mail_address	
	EOF	
	where:	
	• <i>IDM_ORACLE_HOME, oid_host</i> , and <i>oid_port</i> are variables whose values are determined by your installed environment	
	 dn_of_super_user_entry is the distinguishedname of the user entry in LDAP, for example: cn=faadmin,cn=users,dc=mycompany,dc=com 	
	 e-mail_address is a fully qualified email address of form user@domain.com 	
Task 2: Sign in to OIM	Launch the OIM URL and use the OIM system administrator user name and password to sign in.	Oracle Fusion Middleware Enterprise Deployment Guide for Oracle Identity Management (Oracle Fusion Applications Edition)
Task 3: Reconcile LDAP and Oracle Identity Manager	Click the Advanced link in the upper right of the interface.	"Preparing the Oracle Fusion Applications Super User for User
	Click Search Scheduled Jobs in the System Administration tasks.	Management and Configuration" in the <i>Getting Started and Security</i> section of the <u>Oracle Fusion Applications Release</u>
	Enter LDAP User Create and Update Full Reconciliation in the Search Scheduled Jobs field.	Notes LDAP Scheduled Tasks in Oracle Fusion Middleware Administrator's Guide for
	Select the job in the search results.	Oracle Identity Manager
	Click Run Now to reconcile user updates based on the change log from LDAP.	

Table 2: Preparing IT Security Manager Role for User and Role Management

By default the super user created when installing and provisioning Oracle Fusion Applications (for example, FAADMIN) has all necessary access for implementing Oracle Fusion Applications and administering security. This access is provided by the following roles:

- Application Implementation Consultant
- IT Security Manager

Neither of these roles provides access needed for creating and managing Oracle Fusion Applications users. Therefore, you must add the following two OIM roles to the **IT Security Manager** role:

- Identity User Administrators, which carries user management entitlement
- Role Administrators, which carries role management entitlement

Note: If you plan to implement your pilot project entirely while signed in as the super user and do not plan to create additional users, then you can skip this step.

Tasks	Description	Documentation
Task 1: Sign in to OIM	Launch the OIM URL and use the OIM system administrator user name and password to sign in.	Oracle Fusion Middleware Enterprise Deployment Guide for Oracle Identity Management (Oracle Fusion Applications Edition)
Task 2: Provision the IT Security Manager role with the Identity User Administrators role	Click on Administration in the upper right of the interface, search for the Identity User Administrators role, and select the role name in the search results.	"Provision the IT Security Manager Job Role with Roles for User and Role Management" in the <i>Getting Started and Security</i> section of the <u>Oracle Fusion Applications Release</u> Notes
	From the Hierarchy tab, click on Inherits From.	
	Click on Add .	
	Select the role category: Common – Job Roles and click the find arrow.	
	Select IT Security Manager and move it to the Add Role list.	
	Click Save.	
Task 3: Provision the IT Security Manager role with the Role Administrators role	Follow the same steps as specified above to add the Role Administrators role to the IT Security Manager role's role inheritance.	Managing Roles in <u>Oracle Fusion</u> <u>Middleware User's Guide for Oracle Identity</u> <u>Manager</u>

Task 4: Assign the IT Security Manager role to the Xellerate Users organization	Return to the Welcome to Identity Manager Delegated Administration page, search for the Xellerate Users organization and select the organization name in the search results.	"Provision the IT Security Manager Job Role with Roles for User and Role Management" in the <i>Getting Started and Security</i> section of the <u>Oracle Fusion Applications Release</u> <u>Notes</u>
	Click the Administrative Roles link in the row of links above the Xellerate Users page.	
	In the Filter By Role Name field of the Details window, enter	
	IT_SECURITY_MANAGER	
	Click Find.	
	Enable Read , Write , Delete , and Assign.	
	Click Assign and Confirm.	

Table 3: Generating Functional Setup Task List

To start an implementation of Oracle Fusion Applications, select the offering you want to implement first and then generate the setup tasks needed to implement it.

Note: In a pilot project, you can use the Oracle Fusion Applications super user to generate setup tasks to start implementation. This super user, however, is created with broad access to Oracle Fusion Middleware and applications administration. Therefore, it is recommended that you create one or more dedicated users to manage your implementation projects after you complete your pilot project. See *Getting Started and Security* in the <u>Oracle Fusion Applications Release Notes</u> for more details.

Tasks	Description	Documentation
Task 1: Sign in to Oracle Fusion Applications	Use the Oracle Fusion Applications URL and the Oracle Fusion Applications super user to sign in to Oracle Fusion Applications.	
	The Welcome page appears.	
Task 2: Go to the Setup and Maintenance work area	Select Setup and Maintenance under the Tools category in the Navigator to go to the Setup and Maintenance work area.	 Overview chapter Manage Application Implementation: Overview
Task 3: Browse offerings from the Getting Started Page	Use the Getting Started with Oracle Fusion Applications page to view all Oracle Fusion Applications offerings.	<i>Gathering Your Implementation Requirements</i> chapter

The documentation in this table is found in the <u>Oracle Fusion Applications Information Technology</u> <u>Management, Implement Applications Guide</u>.

Tasks	Description	Documentation
Task 4: Analyze implementation requirements of the offerings	Drill down on an offering of your choice to view a description, documents, and reports related to the offering from Related Documents page.	<i>Gathering Your Implementation</i> <i>Requirements</i> chapter • Offerings Explained
Task 5: Configure offerings	Use the Configure Offerings page to configure the offerings of your choice to fit to your business requirements. Expand any offering to find its optional modules, called Options. Select all that apply to your organization.	 Gathering Your Implementation Requirements chapter Options: Explained Feature Choices: Explained
	Similarly use the Select Feature Choices page to review optional or alternative business processes, all of which may not apply to your implementation. Select all that apply to your organization.	
Task 6: Generate setup tasks	Create a new implementation project from the Manage Implementation Projects page to generate setup tasks for a selected offering.	<i>Managing an Application Implementation</i> chapter
Task 7: Review autogenerated setup task list	The task list displayed is generated based on the tasks that are relevant to the offerings and options that you selected. The most common requirements across all offerings are listed first. Next, the common tasks across product families are shown. Next are common tasks across product modules. Tasks that are specific to product functionality are listed last. You can expand the task lists to see the relevant tasks.	 Managing an Application Implementation chapter Implementation Project Task Lists: Explained

Table 4: Defining Implementation Users

One of the first steps in your functional setup task list involves defining implementation users. Implementation users collectively represent the users who typically have the following responsibilities:

- Administering Oracle Fusion Applications users and security
- Managing implementation projects for Oracle Fusion Applications offerings
- Setting up basic enterprise structure needed to implement Oracle Fusion Applications offerings

In the pilot project, you use the Oracle Fusion Applications super user to administer application users and security and to manage the implementation project.

If you plan to use the Oracle Fusion Applications super user to set up the basic enterprise structure as well, then you do not need to create any additional users. Alternatively you might want to distribute the

responsibilities for setting up the basic enterprise structure to multiple people and create one or more implementation users.

For the pilot project, provide the **Application Implementation Consultant** role to these additional users. After the pilot project, you might want to enforce segregation of duties and provisions users with appropriate enterprise roles according to their job responsibilities. Refer to the <u>Oracle Fusion Applications</u> <u>Security Reference Manuals</u> for details.

Note: This process for creating users is only used prior to the basic enterprise structure being in place (see below). Once the basic enterprise structure is set up, this initial user creation process should be disregarded. Instead you should only use the Define Users process or employee onboarding described later to manage Oracle Fusion Applications users. Consequently this initial user creation for enterprise setup is only applicable during the first implementation project and not in future projects.

Tasks	Description	Documentation
Task 1: Expand the Define Common Applications Configuration task list	From your implementation project, expand the Define Common Applications Configuration for <offering name=""> task list, which contains the tasks that you need to perform to define implementation users.</offering>	
Task 2: Run the user and roles synchronization process	Perform the Run User and Role Synchronization task. This task synchronizes LDAP users and roles with HCM user management so that users can be provisioned with roles through HCM and all user access can be audited. Verify that the SyncRolesJob process has completed before beginning the next task.	"Synchronize LDAP Users with HCM User Management " in the <i>Getting Started and</i> <i>Security section</i> of the <u>Oracle Fusion</u> <u>Applications Release Notes</u>
Task 3: Create implementation users	Create one or more implementation users who will set up the basic enterprise structures to enable the Define User process (see <u>Table 6</u>). For your pilot project, provision the implementation users with the Application Implementation Consultant role.	"Create Users for Enterprise Structure Setup" in the <i>Getting Started and Security</i> section of the <u>Oracle Fusion Applications</u> <u>Release Notes</u>
	Note: This task is optional if you decide to use only the Oracle Fusion Applications super user to set up basic enterprise structure for your pilot project.	
Task 4: Create datarole forimplementation users	Create a "View All" data role and a reference data sharing Set ID data role that grant access to data in secured objects required for performing HCM setup steps.	"Create Users for Enterprise Structure Setup" in the <i>Getting Started and Security</i> section of the <u>Oracle Fusion Applications</u> <u>Release Notes</u>
		Oracle Fusion Applications Security Reference Manuals

Tasks	Description	Documentation
Task 5: Provision roles to implementation users	Provision the View All and Set ID data roles to the Oracle Fusion Applications super user. If you created additional implementation users (see previous task), provision the following roles to them:	"Create Users for Enterprise Structure Setup" (role provisioning steps) in the <i>Getting Started and Security</i> section of the <u>Oracle Fusion Applications Release Notes</u>
	Application Implementation Consultant enterprise role	

• View All and Set ID data roles

This figure shows the tasks from <u>Table 4</u>: Defining Implementation Users in a flow where the super user creates and provisions an IT security manager user who then creates implementation users and provisions them for enterprise setup. The tasks are called out in the figure by number.

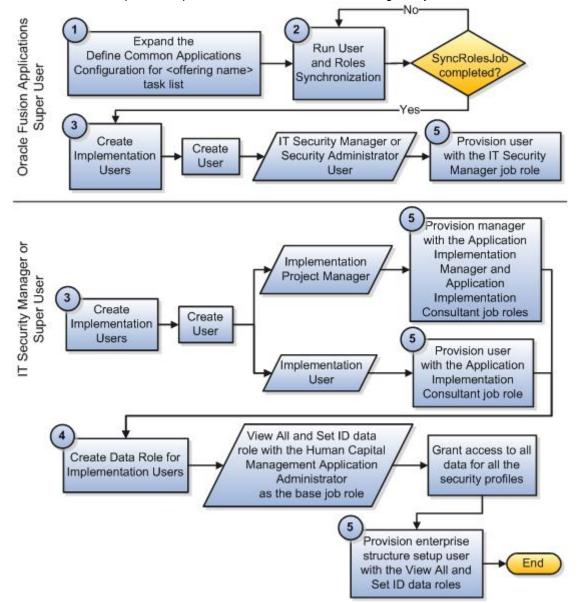


Table 5: Setting Up Basic Enterprise Structure

The basic enterprise structure must be in place before any of the Oracle Fusion Applications offerings can be set up. The tasks in the following table explain the baseline steps you must perform to set up your basic enterprise structure. These tasks appear in the functional setup task list that you generated in the Setup and Maintenance work area; however, in your task list, the tasks may appear in a different sequence, and may be interspersed with other tasks.

In your pilot project, you can have the Oracle Fusion Applications super user perform these tasks. Alternatively, if you have created additional implementation users (see <u>Table 4</u>) and want them to set up the enterprise structure, then you need to assign specific tasks to them.

Tasks	Description	Documentation
Task 1: Assign tasks to users	This task is applicable only if users other than the Oracle Fusion Applications super user are expected to perform the tasks.	
Task 2: Sign in as the assigned user and find your assigned tasks	This task is applicable only if users other than the Oracle Fusion Applications super user are expected to perform the tasks.	
	Each assigned user will sign in using the Oracle Fusion Applications URL and his or her own user name and password.	
	Then users will go to the Assigned Implementation Tasks tab to find their assigned tasks.	
Task 3 Define reference data sharing	Perform the tasks in the Define Reference Data Sharing for HCM activity. Setting up reference data for HCM is a prerequisite to managing users in HCM using the Manage Users task. See <u>Table 6</u> : Defining Users.	 Maintain Common Reference Objects chapter, <u>Oracle Fusion Applications</u> <u>Common Implementation Guide</u> Reference Data Sets and Sharing Methods: Explained Assigning Reference Data Sets to Reference Objects: Points to Consider

Tasks	Description	Documentation
Task 4: Load geographies	 Perform the Load US Geographies task if you are using US Payroll, or the Load Chinese Geographies task for Chinese locations. If you are not using Human Capital Management (HCM), use the following tasks to load geography data from a CSV or XML file: Run Geography Loader task Manage File Import Activities task Load Geography Interface Data manual task Geography information is used in Oracle Fusion Applications for address entry and geography-based business processes, for example, territory management and shipping. 	Common CRM Configuration: Define File- Based Data Import chapter, Oracle Fusion Applications Sales Implementation Guide or Define Common CRM Configuration chapter, Oracle Fusion Applications Marketing Implementation Guide • File-Based Import Processing: How it Works • Files, Import Objects, Mapping, and Import Activity Components: How They Work Together
Task 5: Manage geographies	Enable the list of values for address fields in UIs.	Define Enterprise Structures chapter, Oracle Fusion Applications Common Implementation Guide • Geography Validation: Explained • Managing Geography Structures, Hierarchies, and Validation: Worked Example
Task 6: Update enterprise information	Change the name and set parameters for the setup enterprise.	Define Enterprise Structures chapter, Oracle Fusion Applications Common Implementation Guide • Managing Enterprise Information for Non-Oracle Fusion HCM Users: Explained Common Applications Configuration: Define Enterprise Structures for Human Capital Management chapter, Oracle Fusion Applications Workforce Deployment Implementation Guide • Selecting the Employment Model: Critical Choices • The Three-Tier Employment Model: Explained • The Two-Tier Employment Model: Explained • Work Day Information: Explained

Tasks	Description	Documentation
Task 7: Set up legislative data group	Define at least one for each country where the enterprise operates, to partition payroll and related data.	<i>Jurisdictions and Legal Authorities</i> chapter, Oracle Fusion Applications Enterprise Structures Concepts Guide (Oracle Fusion Applications Help)
		Legislative Data Groups: Explained
Task 8: Manage legal addresses	Create the address a legal entity uses to register with a legal authority. The legal address must be located within the territory entered.	
Task 9: Manage legal entity	Define a recognized party with rights and responsibilities given by legislation.	<i>Define Enterprise Structures</i> chapter, <u>Oracle Fusion Applications Common</u> <u>Implementation Guide</u>
		Legal Entities: Explained
		Legal Entity in Oracle Fusion: Points to Consider
Task 10: Manage legal entity HCM information	Specify HCM information, such as the employment model to be used and the standard working hours, for a legal entity, or legal employer.	<i>Define Enterprise Structures</i> chapter, <u>Oracle Fusion Applications Common</u> <u>Implementation Guide</u>
		HCM Organization Models: Examples
		 Payroll Statutory Units, Legal Employers, and Tax Reporting Units: How They Work Together
		Common Applications Configuration: Define Enterprise Structures for Human Capital Management chapter, <u>Oracle Fusion</u> Applications Workforce Deployment Implementation Guide
		Selecting the Employment Model: Critical Choices
		The Three-Tier Employment Model: Explained
		The Two-Tier Employment Model: Explained
		Work Day Information: Explained
Task 11: Manage business unit and manage	Assign business units to the common reference data set.	Defining Business Units (demo in Oracle Fusion Applications Help)
business unit set assignment		<i>Define Enterprise Structures</i> chapter, <u>Oracle Fusion Applications Common</u> <u>Implementation Guide</u>
		Business Units: Explained
		 Modeling Your Business Units in Your Enterprise Structure in Oracle Fusion: Example

Tasks	Description	Documentation
Task 12: Manage locations	Identify physical addresses of a workforce structure, such as a department or a job. Perform this task only if you see it in your offering.	<i>Define Enterprise Structures</i> chapter, <u>Oracle Fusion Applications Common</u> <u>Implementation Guide</u> • Locations: Explained
Task 13: Manage departments	Define organizations with one or more operational objectives or responsibilities that exist independently of their manager. Perform this task only if you see it in your offering.	Define Enterprise Structures chapter, Oracle Fusion Applications Common Implementation Guide • Cost Centers and Departments: Explained • Department Classification: Points to Consider
Task 14: Manage job	Create the enterprise job definitions. Perform this task only if you see it in your offering.	Define Enterprise Structures chapter, Oracle Fusion Applications Common Implementation Guide • Jobs: Example

Table 6: Defining Users

Since you have set up the basic enterprise structure in the previous step (see <u>Table 5</u>), you should create the application users you need for implementing and transacting the Oracle Fusion Applications offerings using this process. For a full list of security reference roles that have access to various tasks, refer to the <u>Oracle Fusion Applications Security Reference Manuals</u>.

Note: If you plan to use the Oracle Fusion Applications super user or the implementation users you created with the Application Implementation Consultant role (see <u>Table 4</u>) to perform all tasks in your pilot project, then you can skip this step.

Tasks	Description	Documentation
Task 1: Assign tasks to users	This task is applicable only if users other than the Oracle Fusion Applications super user are expected to perform the tasks.	
Task 2: Sign in as the assigned user and find your assigned tasks	This task is applicable only if users other than the Oracle Fusion Applications super user are expected to perform the tasks.	
	Each assigned user will sign in using Oracle Fusion Applications URL and his/her own user name and password.	
	Then they will go to Assigned Implementation Tasks tab to find their assigned tasks.	

Tasks	Description	Documentation
Task 3: Manage HCM role provisioning rules	Define conditions for automatic and manual provisioning of roles to users.	 Define Security chapter, Oracle Fusion Applications Common Implementation Guide Role Mappings: Explained Role Mappings: Examples Role Provisioning and Deprovisioning: Explained
Task 4: Manage users	Create application-user definitions and provision roles to application users using products other than HCM ones when only HCM foundation is available and full HCM is not implemented.	<i>Define Security</i> chapter, <u>Oracle Fusion</u> <u>Applications Common Implementation Guide</u> • Creating Users: Worked Example
	If HCM is fully implemented, use the employee onboarding process to create users.	
Task 5: Create and provision employees	For HCM only, perform the hire employee process, in which person records are created and user IDs are automatically created.	<i>Manage Workforce Lifecycle</i> chapter, Oracle Fusion Applications Workforce Deployment, Human Resources Guide (Oracle Fusion Applications Help)
		Creating Person Records: Examples
		Person Records: Explained

Once you complete these Define User tasks, continue with the remaining functional setup tasks in your implementation project, including additional common tasks in the Define Common Applications Configuration for <offering name> task list. You can use the Oracle Fusion Applications super user to perform the remaining setup tasks or assign the tasks to the newly defined employees or previously created implementation users.

Additional References

<u>Getting Started with Oracle Fusion Applications: Enterprise Structures for Financials</u> (Document ID 1387746.1 on My Oracle Support)

<u>Getting Started with Oracle Fusion Applications: Oracle Fusion Human Capital Management On-Premise</u> <u>Implementations</u> (Document ID 1395863.1 on My Oracle Support)



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