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Getting Started with Oracle Fusion Human Capital Management On-Premise Implementations

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Warning

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

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Introduction

This document provides a high-level introduction to some key tasks that implementors of Oracle Fusion Human Capital Management (Oracle Fusion HCM) must perform. These tasks, which are largely focused on the successful creation of implementation and application users, constitute the first steps in the implementation process after installation and provisioning of Oracle Fusion HCM are complete.

Warning: The tasks presented in this document are intended for a quick introduction or pilot implementation. This document does not include all setup and security tasks that are appropriate for a complete implementation of Oracle Fusion HCM.

References to related help accompany each of the steps. The help is available from Oracle Fusion Applications Help or [Oracle Fusion Applications Technology Library](#), unless specified otherwise.

You can find this document (ID: 1395863.1) on My Oracle Support, <https://support.oracle.com>.

Access Requirements

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

Before you begin, gather the following information:

- URLs for Oracle Fusion Applications and OIM.

For example, the URL for Oracle Fusion Applications is <http://host/homePage/faces/AtkHomePageWelcome>, 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, can 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 user names and passwords specified during installation and provisioning.

- The 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

To start your implementation, complete these steps as described in the following sections.

1. [Preparing the Oracle Fusion Applications Super User for User Management and Configuration](#)
2. [Preparing the IT Security Manager Role for User and Role Management](#)
3. [Generating the Setup Task List](#)
4. [Defining Implementation Users](#)
5. [Setting Up Basic Enterprise Structures](#)
6. [Defining Application Users](#)

After completing these initial tasks, continue with the remaining functional setup of the offering you have chosen for your implementation project.

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 (FAADMIN, by default) has no e-mail address; however, user management and configuration require that the super user has an e-mail address. Complete the tasks in the following table to create the super user's e-mail address.

Task	Description	Documentation
<p>1. Update the Oracle Fusion Applications super user ID in LDAP (Oracle Internet Directory)</p>	<p>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:</p> <pre>\$IDM_ORACLE_HOME /bin/ldapmodify -h oid_host -p oid_port -D "cn=orcladmin" -w password_for_orcladmin <<EOF</pre> <pre>dn: dn_of_super_user_entry changetype: modify replace: mail mail:e-mail_address EOF</pre> <p>where:</p> <ul style="list-style-type: none"> • <i>IDM_ORACLE_HOME</i>, <i>oid_host</i>, and <i>oid_port</i> are variables whose values are determined by your installed environment. • <i>dn_of_super_user_entry</i> is the distinguished name of the user entry in LDAP; for example, <i>cn=faadmin,cn=users,dc=mycompany,dc=com</i> • <i>e-mail_address</i> is a fully qualified e-mail address in the format user@domain.com 	<p>"Preparing the Oracle Fusion Applications Super User for User Management and Configuration" in the <i>Getting Started and Security</i> section of the Oracle Fusion Applications Release Notes</p>
<p>2. Sign in to OIM</p>	<p>Use the OIM system administrator user name and password.</p>	<p>Oracle Fusion Middleware Enterprise Deployment Guide for Oracle Identity Management (Oracle Fusion Applications Edition)</p>
<p>3. Reconcile LDAP and OIM</p>	<p>Click the Advanced link in the upper right of the interface.</p> <p>Click Search Scheduled Jobs in the System Administration tasks.</p> <p>Enter LDAP User Create and Update Full Reconciliation in the Search Scheduled Jobs field.</p> <p>Select the job in the search results.</p> <p>Click Run Now to reconcile user updates based on the change log from LDAP.</p>	<p>"Preparing the Oracle Fusion Applications Super User for User Management and Configuration" in the <i>Getting Started and Security</i> section of the Oracle Fusion Applications Release Notes</p> <p>LDAP Scheduled Tasks in Oracle Fusion Middleware Administrator's Guide for Oracle Identity Manager</p>

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

The Oracle Fusion Applications super user (FAADMIN, by default) has all necessary access rights for implementing Oracle Fusion HCM and administering security. This access is provided by the following job roles:

- Application Implementation Consultant
- IT Security Manager

However, neither of these roles provides the access needed for creating and managing Oracle Fusion Applications users; therefore, the following two OIM roles must be added by the OIM system administrator to the IT Security Manager job role:

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

The following table identifies the tasks the OIM system administrator performs to update the IT Security Manager role.

Task	Description	Documentation
1. Sign in to OIM	Use the OIM system administrator user name and password.	Oracle Fusion Middleware Enterprise Deployment Guide for Oracle Identity Management (Oracle Fusion Applications Edition)
2. Provision the IT Security Manager role with the Identity User Administrators role	<p>On the Administration tab, search for the IDENTITY USER ADMINISTRATORS role and select the role name in the search results.</p> <p>On the Hierarchy tab, click Inherits From.</p> <p>Click Add, search Common – Job Roles for the IT Security Manager role, move the role to the Add Role list, and click Save.</p>	"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 Oracle Fusion Applications Release Notes
3. Provision the IT Security Manager role with the Role Administrators role	Follow the instructions for task 2 (above) to add the ROLE ADMINISTRATORS role to the IT Security Manager role.	"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 Oracle Fusion Applications Release Notes

<p>4. Assign the IT Security Manager role to the Xellerate Users organization</p>	<p>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.</p> <p>Click Administrative Roles. In the Filter by Role Name field of the Details window, enter:</p> <p>*IT_SECURITY_MANAGER*</p> <p>Click Find.</p> <p>Enable Read, Write, Delete, and Assign. Click Assign and Confirm.</p>	<p>"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 Oracle Fusion Applications Release Notes</p>
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Table 3: Generating the Setup Task List

To start an implementation of Oracle Fusion HCM, the Oracle Fusion Applications super user (FAADMIN) selects an offering to implement and generates the setup tasks needed to implement it.

The following table identifies how to generate the setup tasks. The documentation in this table is in the [Oracle Fusion Applications Information Technology Management, Implement Applications Guide](#).

Task	Description	Documentation
<p>1. Sign in to Oracle Fusion Applications</p>	<p>Using the Oracle Fusion Applications URL, sign in to Oracle Fusion Applications as the Oracle Fusion Applications super user.</p> <p>The Welcome page appears.</p>	
<p>2. Go to the Setup and Maintenance work area</p>	<p>Select Setup and Maintenance under the Tools category in the Navigator to go to the Setup and Maintenance work area.</p>	<p><i>Overview</i> chapter</p> <ul style="list-style-type: none"> Manage Application Implementation: Overview
<p>3. Browse offerings on the Getting Started Page</p>	<p>On the Getting Started with Oracle Fusion Applications page, view all Oracle Fusion Applications offerings.</p>	<p><i>Gathering Your Implementation Requirements</i> chapter</p>
<p>4. Analyze implementation requirements of the offerings</p>	<p>Drill down on the Oracle Fusion HCM offering of your choice to view a description, documents, and reports related to the offering on the Documents page.</p>	<p><i>Gathering Your Implementation Requirements</i> chapter</p> <ul style="list-style-type: none"> Offerings Explained

Task	Description	Documentation
5. Configure offerings	<p>On the Configure Offerings page, configure the offerings of your choice to fit your business requirements.</p> <p>Expand any offering to find its optional modules, called Options. Select all that apply to your organization.</p> <p>Use the Select Feature Choices page to review optional or alternative business processes. Select all that apply to your enterprise.</p>	<p><i>Gathering Your Implementation Requirements</i> chapter</p> <ul style="list-style-type: none"> Options: Explained Feature Choices: Explained
6. Generate setup tasks	<p>Create a new implementation project on the Manage Implementation Projects page to generate setup tasks for a selected offering.</p>	<p><i>Managing an Application Implementation</i> chapter</p>
7. Review the generated setup task list	<p>The task list includes the tasks that are relevant to the offerings and options that you selected.</p> <p>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.</p> <p>You can expand the task lists to see the tasks that they contain.</p>	<p><i>Managing an Application Implementation</i> chapter</p> <ul style="list-style-type: none"> Implementation Project Task Lists: Explained

Table 4: Defining Implementation Users

The Oracle Fusion Applications super user (FAADMIN) could perform all tasks in your Oracle Fusion HCM implementation project. However, it is good security practice to allocate implementation tasks to one or more implementation users. The responsibilities of implementation users are in three broad categories:

- Creation of users and security management
- Management of implementation projects
- Setup of enterprise structures

The job roles required by each type of implementation user are as follows:

Implementation Responsibilities	Required Job Roles
Creation of users and security management	IT Security Manager
Management of implementation projects	Application Implementation Manager
Setup of enterprise structures	Application Implementation Consultant

The number of implementation users you create will depend on factors such as the offerings you are implementing and local practice, but a minimum of two (one with the IT Security Manager role and one without) is recommended.

From your implementation project, expand the Define Common Applications Configuration for Human Capital Management task list. This task list contains the tasks that you perform to create implementation users and provision them with the required roles. Perform the implementation tasks identified in the following table.

Task	Description	Documentation
1. Synchronize HCM user and role information with OIM	<p>Performer: Oracle Fusion Applications super user (FAADMIN)</p> <p>Perform the task Run User and Roles Synchronization Process. This task initiates the Retrieve Latest LDAP Changes process, which copies to HCM all role and user information stored in OIM and the LDAP directory. (Note that the process name appears as SyncRolesJob). Take a note of the process ID.</p> <p>Search for the process by its process ID in the Scheduled Processes work area to confirm that it completed successfully. You cannot create data roles for implementation users (Task 4) until role information from OIM is available in HCM.</p>	<p><i>Define Synchronization of Users and Roles from LDAP</i> chapter, Oracle Fusion Applications Common Implementation Guide</p> <ul style="list-style-type: none"> User and Role Synchronization: Explained
2. Create an implementation user for user and security management	<p>Performer: Oracle Fusion Applications super user (FAADMIN)</p> <p>In OIM, create a user account for the implementation user who will create other users and manage security. Provision this user with the IT Security Manager role.</p>	<p>"Create Security Administrators" in the <i>Getting Started and Security</i> section of the Oracle Fusion Applications Release Notes</p>
3. Create additional implementation users	<p>Performer: IT Security Manager</p> <p>In OIM, create user accounts for one or more implementation users who will manage implementation projects and set up the enterprise structures during implementation. Provision these users with the Application Implementation Consultant and Application Implementation Manager roles, as appropriate.</p>	<p>Step 1 in "Create Users for Enterprise Structure Setup" and "Create Implementation Project Managers" in the <i>Getting Started and Security</i> section of the Oracle Fusion Applications Release Notes</p>
4. Create an HCM data role for implementation users	<p>Performer: IT Security Manager</p> <p>Perform the task Create Data Role for Implementation Users to create an HCM data role for the Application Implementation Consultant job role. Provide the data role with View All access to all HCM objects that appear in the data role by searching for and selecting the predefined View All security profile for each object.</p>	<p>Step 2 in "Create Users for Enterprise Structure Setup" in the <i>Getting Started and Security</i> section of the Oracle Fusion Applications Release Notes</p>

Task	Description	Documentation
5. Create data roles for HCM reference-set data	<p>Performer: IT Security Manager</p> <p>Perform the task Manage Role Templates to generate data roles in APM using data role templates. These data roles enable implementation users to create reference-set data such as jobs, departments, and locations.</p>	Step 4 in "Create Users for Enterprise Structure Setup" in the <i>Getting Started and Security</i> section of the Oracle Fusion Applications Release Notes
6: Provision data roles to implementation users	<p>Performer: IT Security Manager</p> <p>Perform the task Provision Roles to Implementation Users. In OIM, provision the View All HCM data role (from task 4) and any reference-set data roles (from task 5) to implementation users.</p>	Step 5 in "Create Users for Enterprise Structure Setup" in the <i>Getting Started and Security</i> section of the Oracle Fusion Applications Release Notes

Note: For your first implementation project only, you create implementation users as described in tasks 2 and 3 (above). For subsequent implementation projects, application users will exist. You will be able to provision the necessary job and data roles for implementation tasks to appropriate application users and will not need to create implementation users specifically.

Table 5: Setting Up Basic Enterprise Structures

The tasks in the following table relate to setup of the basic enterprise structures: these are the structures that need to exist before you can create application users. Most of these tasks appear in the setup task list that was generated for the Oracle Fusion HCM offering in the Setup and Maintenance work area; however, in your task list the tasks may be interspersed with other tasks that do not need to be performed before you can create application users. Although you can hire workers without specifying a job, location, or department, those tasks are included here because, in practice, you are likely to want to include those details.

If you use the Enterprise Structures Configurator to create the basic enterprise structures, its interview-based process guides you through the setup of reference data sets, legislative data groups, legal entities, business units, and business unit set assignment; therefore, you can omit tasks 5, 7, 8, and 10 in the following table. Tasks associated with the Enterprise Structures Configurator appear in the Define Enterprise Structures for Human Capital Management task list in the offering setup task list.

Task	Description	Documentation
1. Assign implementation tasks to users	<p>Performer: Application Implementation Manager</p> <p>Assign tasks related to the setup of enterprise structures to implementation users who have the Application Implementation Consultant job role.</p>	

Task	Description	Documentation
2. Sign in as the assigned user and find your assigned tasks	<p>Performer: Application Implementation Consultant</p> <p>Sign in using the Oracle Fusion Applications URL and the user account and password associated with your implementation user role.</p> <p>Navigate to the Assigned Implementation Tasks tab to find assigned tasks.</p>	
3. Load geographies	<p>Performer: Application Implementation Consultant</p> <p>Perform the task Load US Geographies if you are using US Payroll. For Chinese locations and China Payroll, perform the task Load Chinese Geographies.</p> <p>Geography information is used in Oracle Fusion Applications for address entry and geography-based business processes, for example, territory management and shipping.</p>	<p><i>Common CRM Configuration: Define File-Based Data Import</i> chapter, Oracle Fusion Applications Sales Implementation Guide</p> <p>or</p> <p><i>Define Common CRM Configuration</i> chapter, Oracle Fusion Applications Marketing Implementation Guide</p> <ul style="list-style-type: none"> File-Based Import Processing: How it Works Files, Import Objects, Mapping, and Import Activity Components: How They Work Together
4. Manage geographies	<p>Performer: Application Implementation Consultant</p> <p>Perform the task Manage Geographies to enable the list of values for address fields in user interfaces.</p>	<p><i>Define Enterprise Structures</i> chapter, Oracle Fusion Applications Common Implementation Guide</p> <ul style="list-style-type: none"> Geography Validation: Explained Managing Geography Structures, Hierarchies, and Validation: Worked Example
5. Define reference data sharing	<p>Performer: Application Implementation Consultant</p> <p>Perform the task Manage Reference Data Sets.</p> <p>Setting up reference data for HCM is a prerequisite to managing departments, jobs, and locations.</p>	<p><i>Maintain Common Reference Objects</i> chapter, Oracle Fusion Applications Common Implementation Guide</p> <ul style="list-style-type: none"> Reference Data Sets and Sharing Methods: Explained Assigning Reference Data Sets to Reference Objects: Points to Consider
6. Manage legal addresses	<p>Performer: Application Implementation Consultant</p> <p>Perform the task Manage Legal Addresses to create the address a legal entity uses to register with a legal authority.</p>	

Task	Description	Documentation
7. Set up legislative data groups (LDGs)	<p>Performer: Application Implementation Consultant</p> <p>Perform the task Manage Legislative Data Groups to define at least one LDG. The LDG partitions payroll and related data for each country where the enterprise operates.</p>	<p><i>Jurisdictions and Legal Authorities</i> chapter, Oracle Fusion Applications Enterprise Structures Concepts Guide (Oracle Fusion Applications Help)</p> <ul style="list-style-type: none"> Legislative Data Groups: Explained
8. Manage legal entities	<p>Performer: Application Implementation Consultant</p> <p>Perform the task Manage Legal Entity to create one or more legal entities. Select the Payroll statutory unit and Legal employer values, as appropriate.</p>	<p><i>Define Enterprise Structures</i> chapter, Oracle Fusion Applications Common Implementation Guide</p> <ul style="list-style-type: none"> Legal Entities: Explained Legal Entity in Oracle Fusion: Points to Consider
9. Manage legal entity HCM information	<p>Performer: Application Implementation Consultant</p> <p>Perform the task Manage Legal Entity HCM Information to specify HCM information, such as the employment model and the standard working hours, for a legal employer.</p>	<p><i>Define Enterprise Structures</i> chapter, Oracle Fusion Applications Common Implementation Guide</p> <ul style="list-style-type: none"> HCM Organization Models: Examples Payroll Statutory Units, Legal Employers, and Tax Reporting Units: How They Work Together <p><i>Common Applications Configuration: Define Enterprise Structures for Human Capital Management</i> chapter, Oracle Fusion Applications Workforce Deployment Implementation Guide</p> <ul style="list-style-type: none"> Selecting the Employment Model: Critical Choices The Three-Tier Employment Model: Explained The Two-Tier Employment Model: Explained Work Day Information: Explained
10. Manage business unit and business unit set assignment	<p>Performer: Application Implementation Consultant</p> <p>Perform the tasks Manage Business Unit and Manage Business Unit Set Assignment to assign business units to the common reference data set.</p>	<p>Defining Business Units (demo in Oracle Fusion Applications Help)</p> <p><i>Define Enterprise Structures</i> chapter, Oracle Fusion Applications Common Implementation Guide</p> <ul style="list-style-type: none"> Business Units: Explained Modeling Your Business Units in Your Enterprise Structure in Oracle Fusion: Example

Task	Description	Documentation
11. Update enterprise HCM information	<p>Performer: Application Implementation Consultant</p> <p>Perform the task Manage Enterprise HCM Information to review and update the enterprise name and employment model values, as appropriate.</p>	<p><i>Common Applications Configuration: Define Enterprise Structures for Human Capital Management</i> chapter, Oracle Fusion Applications Workforce Deployment Implementation Guide</p> <ul style="list-style-type: none"> • Selecting the Employment Model: Critical Choices • The Three-Tier Employment Model: Explained • The Two-Tier Employment Model: Explained • Work Day Information: Explained
12. Manage locations	<p>Performer: Application Implementation Consultant</p> <p>Perform the task Manage Locations to identify the physical addresses of workforce structures such as departments and jobs.</p>	<p><i>Define Enterprise Structures</i> chapter, Oracle Fusion Applications Common Implementation Guide</p> <ul style="list-style-type: none"> • Locations: Explained
13. Manage departments	<p>Performer: Application Implementation Consultant</p> <p>Perform the task Manage Departments to define departments.</p>	<p><i>Define Enterprise Structures</i> chapter, Oracle Fusion Applications Common Implementation Guide</p> <ul style="list-style-type: none"> • Cost Centers and Departments: Explained • Department Classification: Points to Consider
14. Manage jobs	<p>Performer: Application Implementation Consultant</p> <p>Perform the task Manage Job to create the enterprise job definitions.</p>	<p><i>Define Enterprise Structures</i> chapter, Oracle Fusion Applications Common Implementation Guide</p> <ul style="list-style-type: none"> • Jobs: Example

Table 6: Defining Application Users

Once the basic enterprise structures are set up, you can create Oracle Fusion HCM application users. The following table identifies setup tasks for creating HCM application users.

Task	Description	Documentation
1. Assign tasks to users	<p>Performer: Application Implementation Manager</p> <p>Assign tasks related to user creation and role provisioning to implementation users who have the IT Security Manager job role.</p>	

Task	Description	Documentation
2. Sign in as the assigned user and find your assigned tasks	<p>Performer: IT Security Manager</p> <p>Sign in using the Oracle Fusion Applications URL and the user account and password associated with your implementation user role.</p> <p>Navigate to the Assigned Implementation Tasks tab to find assigned tasks.</p>	
3. Define HCM data security for initial application users	<p>Performer: IT Security Manager</p> <p>Perform the tasks in the task list Define Data Security for Human Capital Management to create security profiles and HCM data roles for application users, such as Employees and Line Managers.</p> <p>Create at least one HCM data role for the Human Resource Specialist (HR Specialist) job role that provides View All access to HCM business objects.</p>	<p><i>Define Data Security for Human Capital Management</i> section, Oracle Fusion Applications Workforce Deployment Implementation Guide, Oracle Fusion Applications Workforce Development Implementation Guide, or Oracle Fusion Applications Compensation Management Implementation Guide.</p>
4. Manage HCM role provisioning rules	<p>Performer: IT Security Manager</p> <p>Perform the task Manage HCM Role Provisioning Rules to create role mappings, which define the conditions for automatic and manual provisioning of job, data, and abstract roles to application users. During implementation, create role mappings for common roles, such as Employee, Line Manager, and Payroll Manager. These few role mappings will handle most of your role assignments.</p> <p>Create at least one role mapping for HR Specialists who will hire other workers. Ensure that this role mapping provisions appropriate roles (including the View All HCM data role created in Task 3, above, and any data roles created for HCM reference-set data) to HR specialists automatically. The role mapping should also include roles that HR specialists can provision manually to other users.</p>	<p><i>Define Security</i> chapter, Oracle Fusion Applications Common Implementation Guide</p> <ul style="list-style-type: none"> • Role Mappings: Explained • Role Mappings: Examples • Role Provisioning and Deprovisioning: Explained

Task	Description	Documentation
5. Create user accounts for workers and provision roles to them	<p>Performer: IT Security Manager</p> <p>Navigate to the New Person work area and perform the Hire an Employee task to hire at least one HR specialist who can hire other workers.</p> <p>When you hire a worker, a user account is created automatically for that worker. Roles for which the worker qualifies automatically in the relevant role mapping are provisioned to that worker.</p>	<p><i>Manage Workforce Lifecycle</i> chapter, Oracle Fusion Applications Workforce Deployment, Human Resources Guide (Oracle Fusion Applications Help)</p> <ul style="list-style-type: none"> • Creating Person Records: Examples • Person Records: Explained

After you complete these Define Application User tasks, continue with the remaining functional setup tasks in your implementation project. The application implementation manager can assign the remaining tasks to appropriate implementation or application users. Once the implementation is complete, you are recommended to review the allocation of roles to implementation users and revoke any roles that are no longer required.

Additional References

[Getting Started with Oracle Fusion Applications Enterprise Structures for Financials: Pilot Projects](#)
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Getting Started with Oracle Fusion Human
Capital Management: User Management
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Oracle Corporation
World Headquarters
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

Worldwide Inquiries:
Phone: +1.650.506.7000
Fax: +1.650.506.7200
oracle.com



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