



Human Capital Management (HCM)

Learner Guide

Fundamentals of Oracle HCM



This course explains how to access and navigate through Oracle Cloud.

1.1 Fundamentals of Oracle Cloud



Oracle Cloud is an integrated suite of Web-based application modules. Currently, this application will be used to perform various HR related activities.

Logging in/ out of Oracle Cloud

Logging In

Users will use the Okta portal to access Oracle HCM.

1. Access the following URL to directly access the Oracle Training Environment <https://ekaw-dev11.fa.us2.oraclecloud.com/>.

The screenshot shows the Oracle Applications Cloud sign-in interface. It includes a 'Company Single Sign-On' button, a 'User ID' field, a 'Password' field, a 'Forgot Password' link, a 'Sign In' button, and a language dropdown menu set to 'English'.

2. Click the **Company Single Sign-On** button to access Oracle. When you log in to the system, you will not see your name because data in the training environment is for practice.

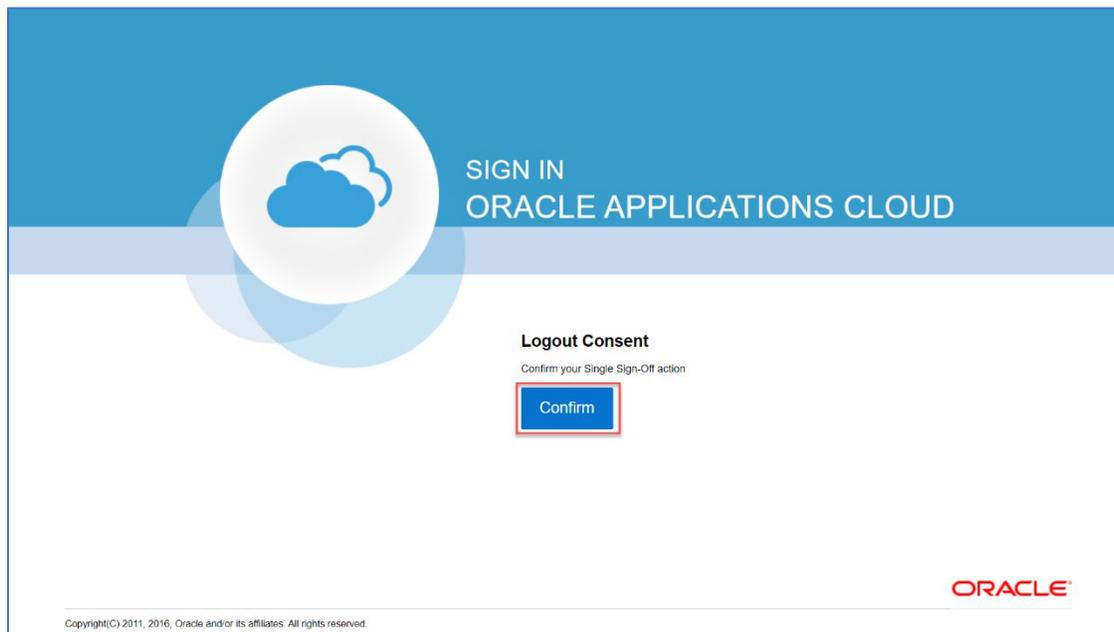
Oracle Cloud is Single Sign On enabled, so if you are already logged into the Securitas network, you will not be required to enter your credentials.

If you are facing any difficulties with single sign-on, enter your network ID and password and click the **Sign In** button.

If you have issues logging in, submit a support service ticket in PowerApp. Refer to the **Instructions for the HCM Training Support Ticketing System** job aid on how to submit a ticket.

Logging out

1. Click your user image or name located at the top right of the screen. This will open the **Settings and Actions** menu.
2. Click the **Log Out** link.
3. Click **Confirm** on the Logout Consent screen.

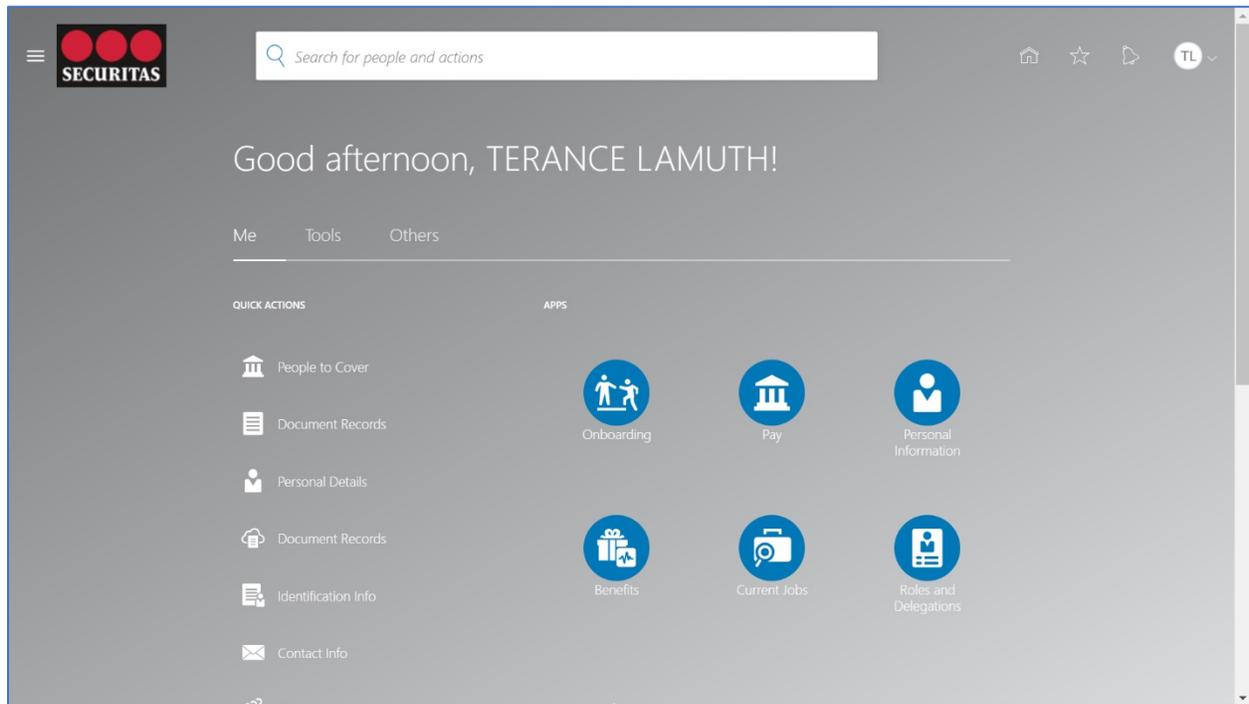


Basic Navigation

When using the HCM system, keep the following in mind:

- Google Chrome is the preferred browser for accessing the Oracle HCM system.
- Use the navigation arrows within Oracle instead of the browser navigation arrows.

Exploring Home Page & Icons



The Home Page contains the following elements:

- **Global Header** – this is always displayed at the top of the page and has the following sections:
 - **Search Icon** – Allows you to search for a page, item, or app within the Oracle system
 - **Home Icon** – Takes you back to the HCM Home Page
 - **Favorites Icon** – Shows a list of pages and apps you’ve added to your favorites
 - **Notifications Icon** – Displays any messages or actions you need to take. To see all your notifications, click the **Show All** link. Notifications are displayed until you take action on them.
- **Tabs** – There are various tabs on the home page, for example, “Me”, “My Team”, “My Client Groups”, etc. The tabs you see are related to your role/ access in the system. This is determined by your position within the Company. Under each tab, you will notice various tiles and Quick Actions for you to perform various transactions. Each tab has the following section:
 - **Springboard** - The grid of tiles on the home page that you can use to open pages
 - **Quick Actions** – A list of links allowing you to complete key tasks

1.2 View Favorites & Recent Items, Troubleshooting in HCM



Now that you understand how to login, let's look at how to navigate to key elements in HCM.

Customizing Interface

Customize Springboard

The **Springboard** refers to the grid of tiles on the home page you can use to open pages. You can personalize your **Springboard** by following these steps:

1. Click the **Plus (+)** icon in the Apps section of the home page.
2. On the **Apps** screen, the tiles and pages are preselected based on your role and access. Select/deselect the tiles and pages you want to show/ hide on the Springboard.



Update Preferences

Update **General Preferences** in the system such as language, currency, time zone, and accessibility by following these steps:

1. Click your initials in the top right corner of the screen to open the **Settings and Actions** menu.
2. Click **Set Preferences**.

The **Preferences** screen appears. There are four (4) major preferences links within the **General Preferences** section:



1. Regional

Use the dropdown menus to update your territory, date format, time format, number format, currency, or time zone. These options determine how these formats are displayed in the system. The default settings are based on U.S. formatting. The default time zone is GMT.

2. Language

Use the dropdown menus to update your default language, language used for the current session, or display name language. The default language is English.

3. My Photo

On the **Change Photo** screen, upload a new photo or remove your existing photo. This is optional and users may upload a photo.

4. Accessibility

On the **Accessibility** screen, use the radio buttons to select screen reader, color contrast, or font size.



TIP:

Your photos should be:

- 2MB or less
- A PNG, GIF or JPEG file
- A picture of you (not in a group)
- Professional and appropriate

Favorites & Recent Items

You can set up favorites and track items that you access frequently to quickly view them in the future. Click the **Favorites and Recent Items** icon to see a list of pages or apps that you have designated as favorites, or that you have recently accessed. On any page, click this icon to add the page as a favorite.

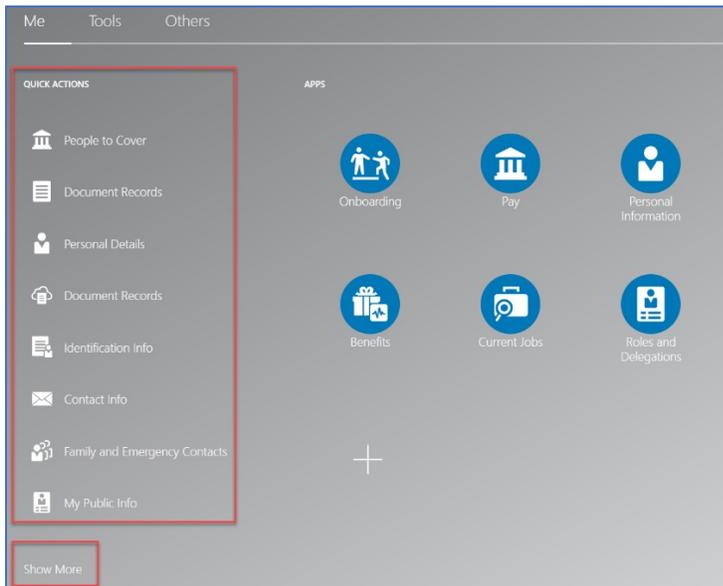


TIP:

Add pages and apps that you want to access quickly without having to navigate through the system.

Quick Actions

Quick Actions are frequently accessed links. Quick Actions appear on the left side of the screen under each tab. The Quick Actions available to you depend on your role and access. These are determined by your position within the company. If you believe you may have incorrect access, connect with your VPHR, HR Manager, or direct supervisor. Click **Show More** to display additional quick actions.



1.3 Managing Transactions



About Transactions

A transaction is a business process that you perform in the system. Some transactions need approval before they take effect. Other transactions don't require approval, but a notification will be sent to your manager after you perform the transaction.

Frequently Used Items / Transactions

Some transactions are used more frequently in the system. See the chart below for a list of frequently used transactions and who is notified when the transaction is made.

Transaction	Requires Approval	Notification
Add / Update Phone Number	No	Manager
Add / Update Email Address	No	Manager
Add / Update Address	No	Manager
Add / Update Payment Method	No	No
Add / Update Tax Withholding (W4)	No	No
Add / Update Emergency Contact	No	No

Reviewing Transactions

You may receive notifications about transactions made in the system. Notifications are typically sent for 3 reasons:

- A transaction needs your review and action.
- A transaction was made, and you receive a notification.
- Action has been taken on a transaction you submitted.

You can see the status of transactions from the **Notification** (bell) icon and via emails

1. Click the **Notification** (bell) icon

A list of recent notifications is displayed in the **Notifications** pop-up window. You may approve or reject transactions that require your action or dismiss notifications.

- a. Click **Show All** to show all notifications
 - i. Click the **Assigned to Me** tab to view your notifications and transactions awaiting your action.
 - ii. Click the **Submitted by Me** tab to view transactions you submitted and withdraw them if necessary.
 - iii. Click the **All** tab to view all your notifications.