

Document Integration Automation for HCM Cloud

One-click Solution for Document Upload to Oracle HCM Cloud



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What is DoQ Integrator?

File Based Loader (FBL) is a commonly used data loading tool in Oracle Fusion Cloud HCM. However, it has a few drawbacks such as lack of support for loading attachment files. On the other hand, HCM Data Loader (HDL) makes the upload process simpler by enabling bulk upload of attachment files to Fusion HCM. For business and technical users, processing files for upload is a cumbersome task, involving careful preparation of DAT file, manual data validation, and running multiple Oracle processes on Fusion before the docs are finally attached to the Person.

DoQ Integrator eliminates all these issues with a simple Excel template and a one-click user interface. The tool performs the required validations, creates DAT files, loads into Fusion, and attaches to the Person Record in Oracle HCM Cloud.

One of the most common use cases of bulk data loaders is 'loading employee document records' (during events such as mass recruitments) or data migration from third party systems. DoQ Integrator automates loading of document records by:

1. Automating file processing
2. Uploading processed files via HDL web services and uploads against the person record in HCM Cloud

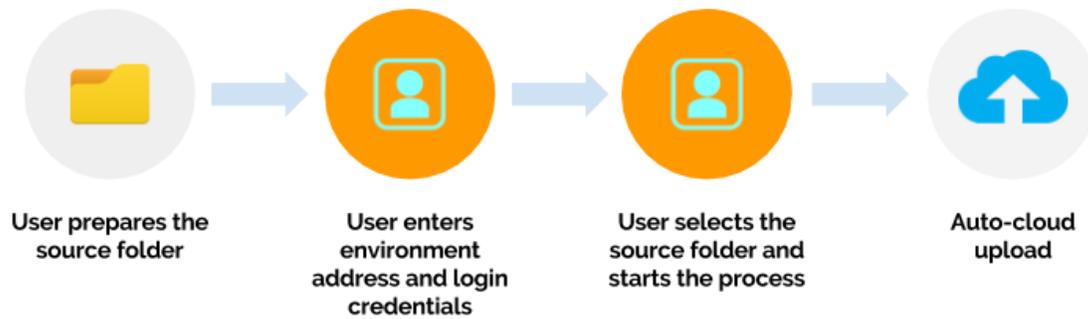
DoQ Integrator leverages Oracle's web services to bulk upload employee files, and attaches them automatically to the employee's record in HCM Cloud. In essence, the tool builds an automated interface that connects third-party systems to HCM cloud in a few clicks. It supports all file formats supported by HDL such as DOCX, .DOC, .PDF, .TXT, .JPEG, and .PNG. Additionally, the tool utilizes a built-in algorithm that automatically batches the upload into HCM Cloud to overcome the one-time upload limit of Oracle UCM.

Features of DoQ Integrator

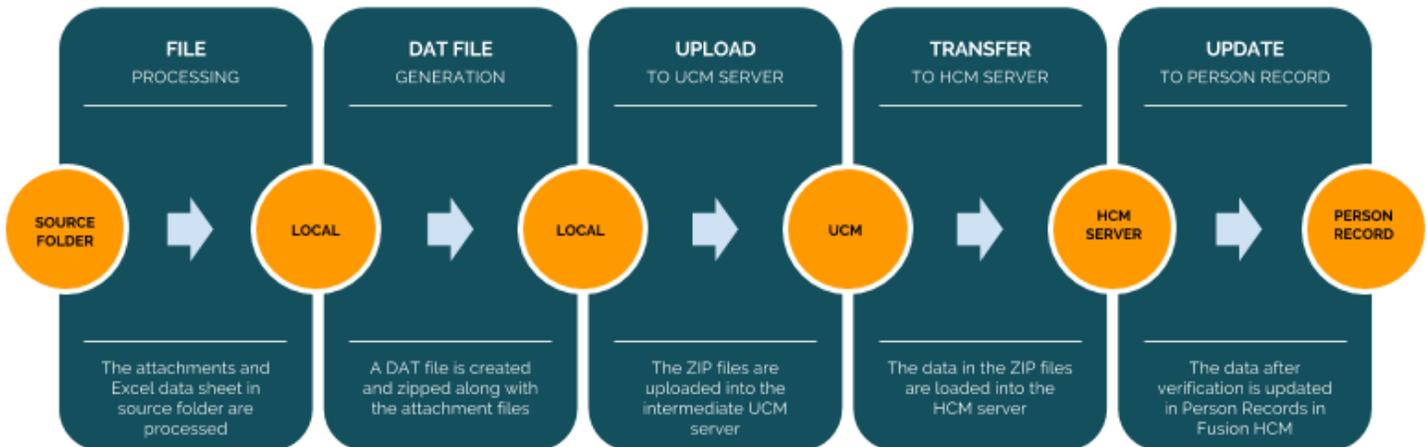
Auto-Cloud Upload

Auto-Cloud Upload option simplifies the process of batch uploading document records. In this scenario, a source folder is prepared containing attachment files for documents of employees and an Excel sheet containing the corresponding data.

ACTIVITY DIAGRAM



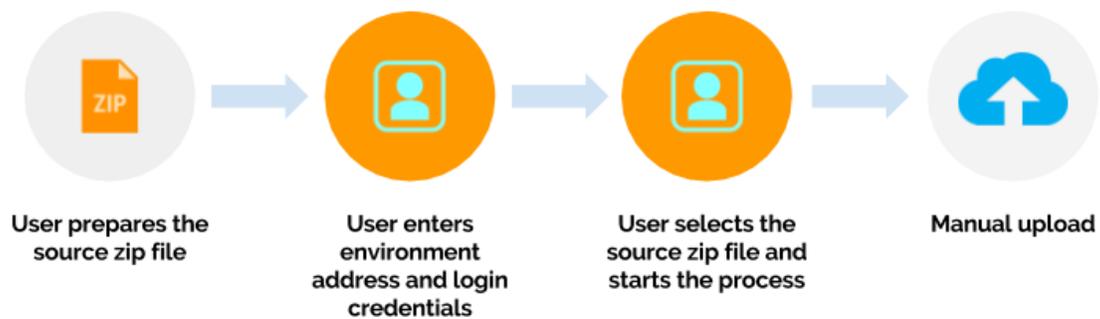
STAGES IN AUTO-CLOUD UPLOAD SYSTEM PROCESS



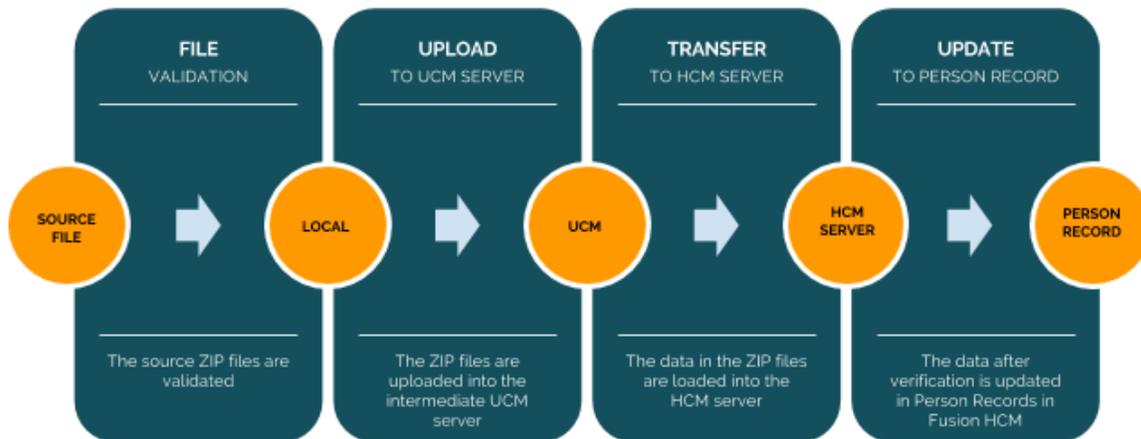
Manual Upload

The Manual Upload option offers experienced technical users the ability to directly upload ZIP files which are already in processed form. In this scenario, users can directly feed the tool with ZIP files processed as per HDL specification.

ACTIVITY DIAGRAM



STAGES IN MANUAL UPLOAD SYSTEM PROCESS



Analytics

Analytics feature provides detailed analysis of files loaded along with status.

UCM

UCM is a content management server that plays the role of an intermediate server while loading data to Fusion HCM server. Any data, before being uploaded into the HCM environment, resides in the UCM server. The 'UCM Browser' displays the contents that resides in the UCM server associated with the Fusion HCM environment. It also displays the list of files available in UCM with options to filter data.

Setup Instructions

Please use the Quick Setup Guide (One-page document) in the Oracle Cloud Marketplace listing. The instructions below are created in case you need detailed navigation path of any features.

Downloading the tool and installation

1. Click [here](#) to download the tool (JAR file)
2. Click [here](#) to download the Java SE Development Kit 8 (JDK 1.8) or above and install it
3. Double-click on the tool (JAR file) to start the application

Administration

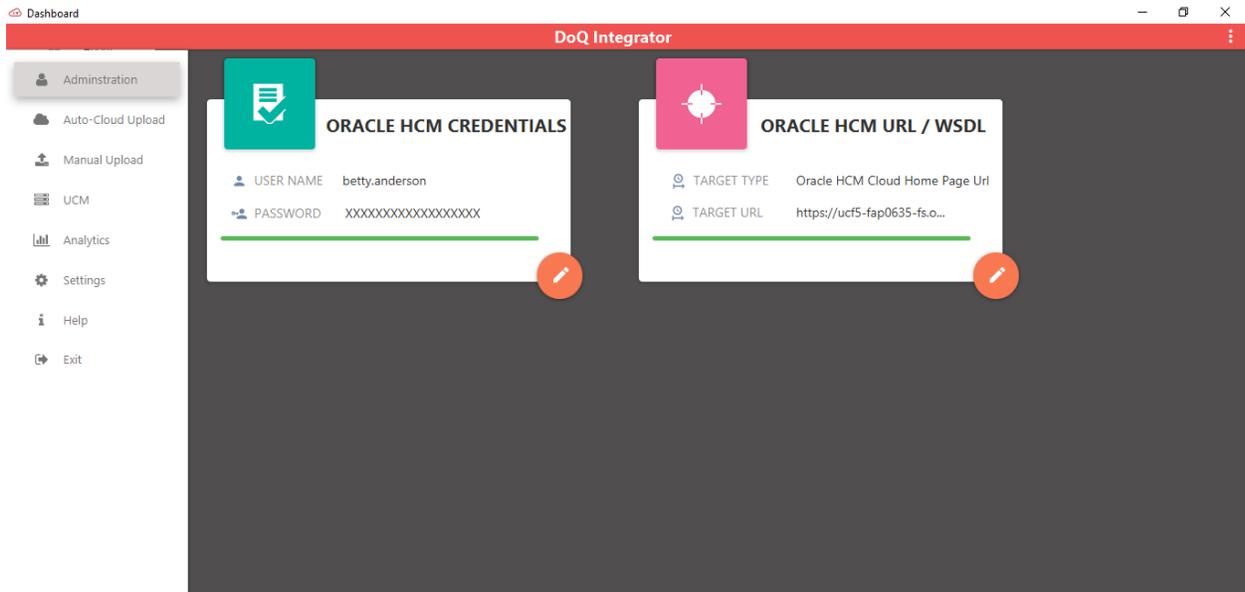
Enter the Fusion HCM URL and Fusion username & password after clicking on the 'administration' tab in the left-hand navigation. It completes all the required validations and provides the status (Success/Failed) after the username, password, and URL are entered.

Note: The Fusion HCM user should have the 'Fusion Implementation Specialist' role. Contact your Oracle Fusion Administrator to get this role assigned to you, if you are the person performing the upload of documents.

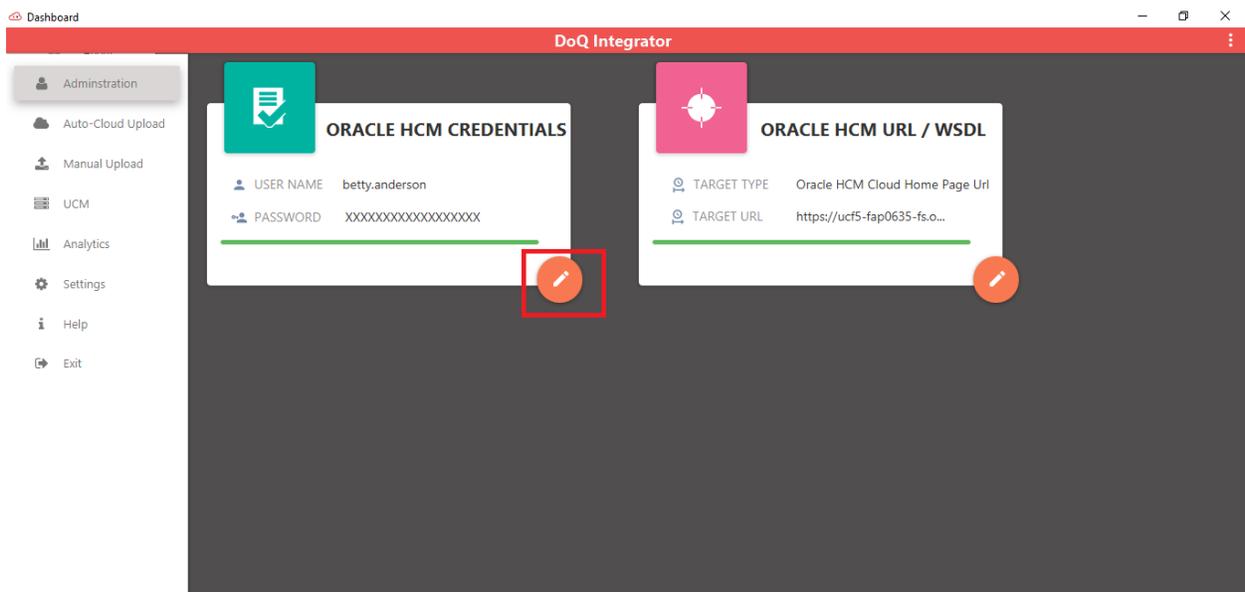
Setting User Credentials

The HCM user credentials needs to be specified if not already done. To do this:

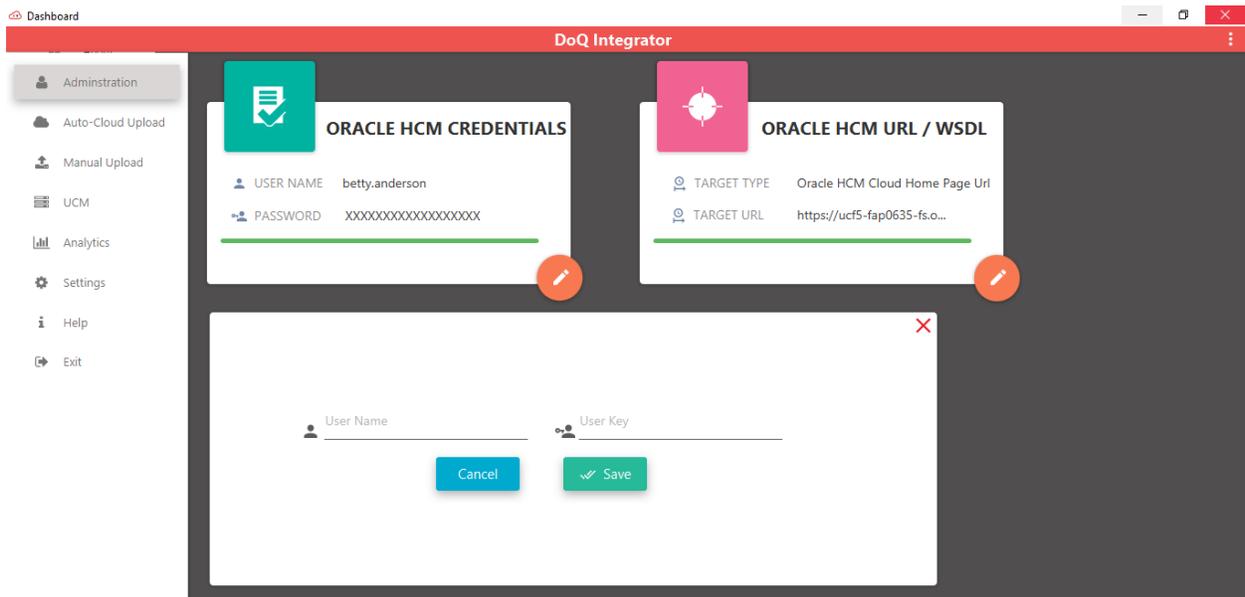
1. In the navigation pane, click on **Administration** tab. The Administration screen appears



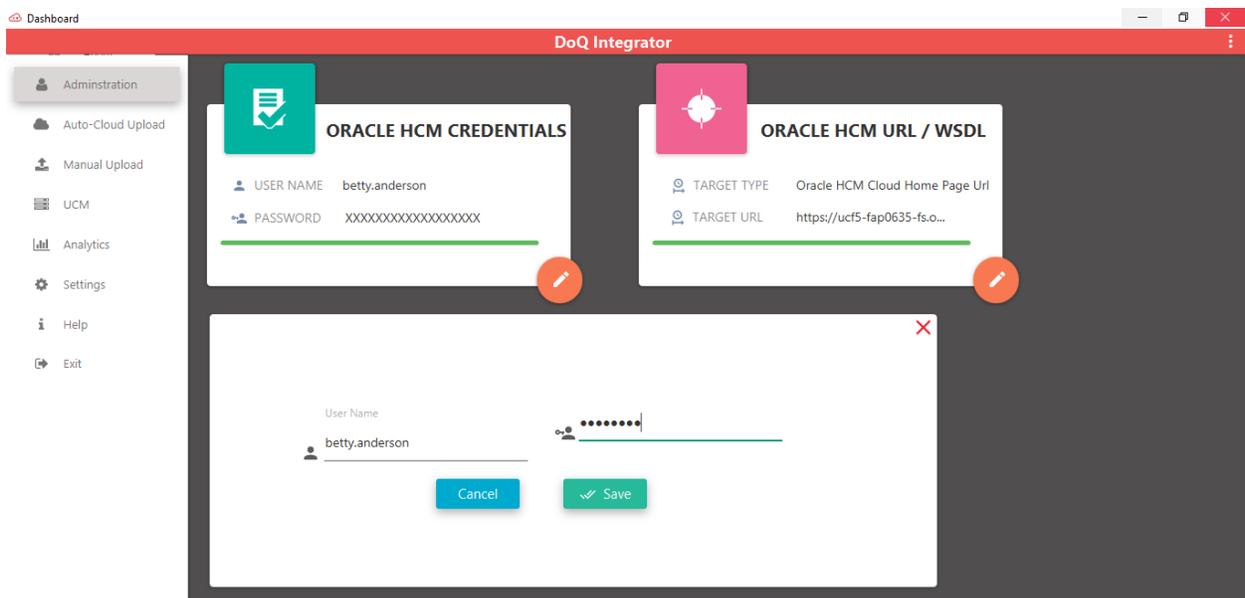
2. Under the **Oracle HCM Credentials** section, click on the orange pencil icon



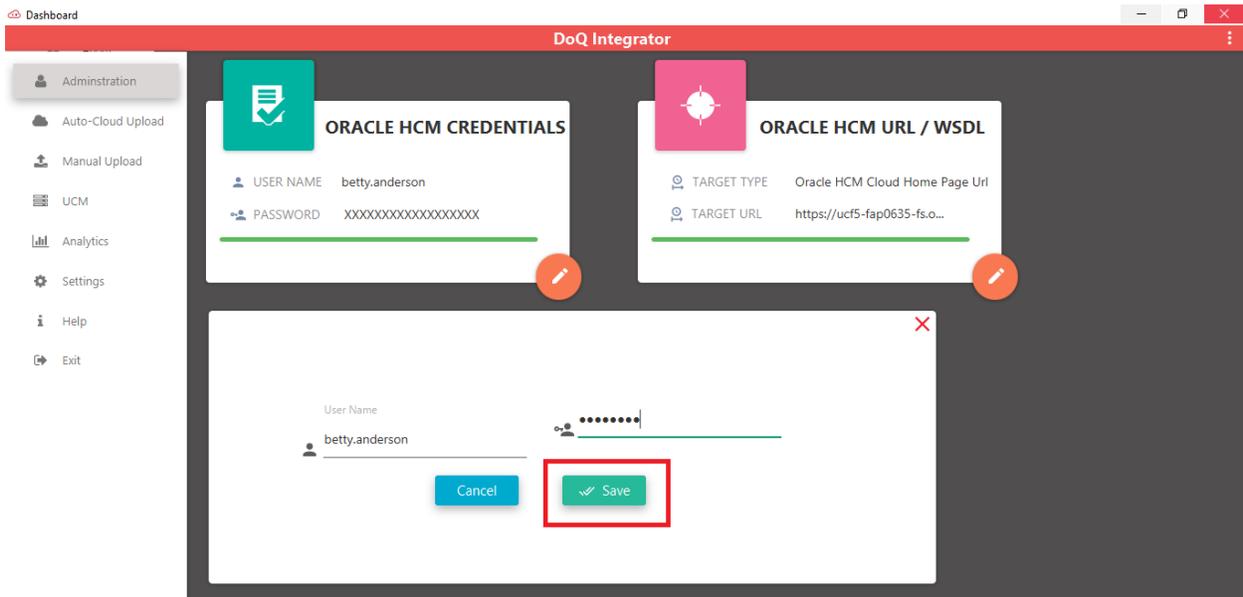
3. Once the pop-up appears, enter the User Name and User Key



4. Enter login credentials of the Oracle Fusion HCM user



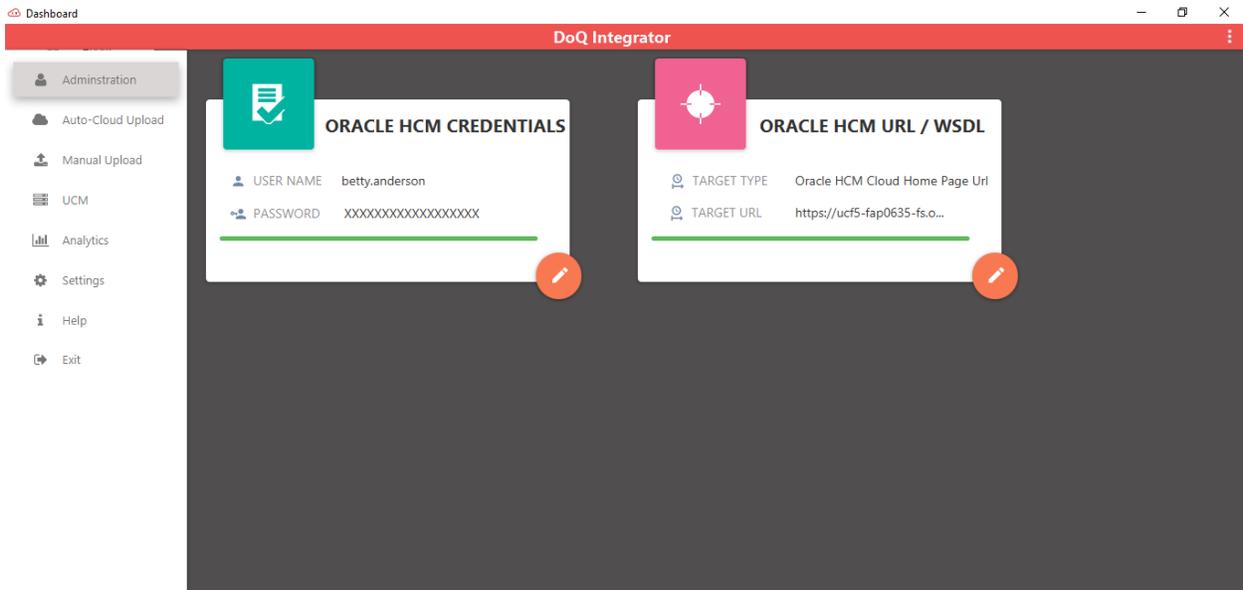
5. Click **Save** to save user credentials



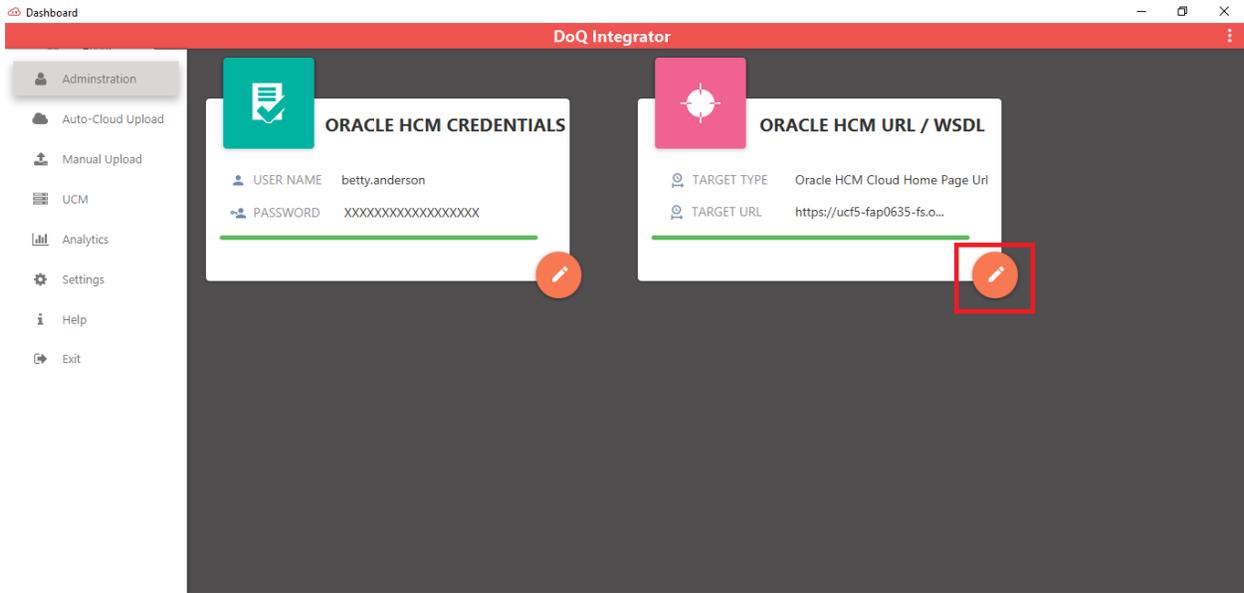
Setting Environment URL

Before initiating the upload process, the environment URL needs to be specified.

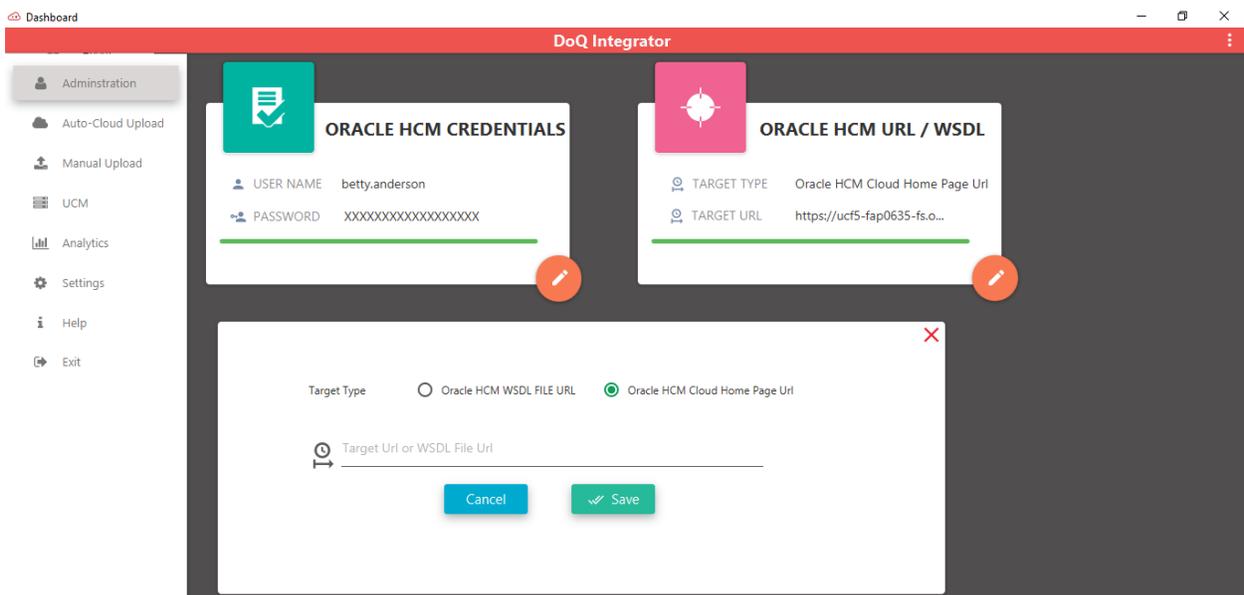
1. In the Navigation Pane, click on the **Administration** tab



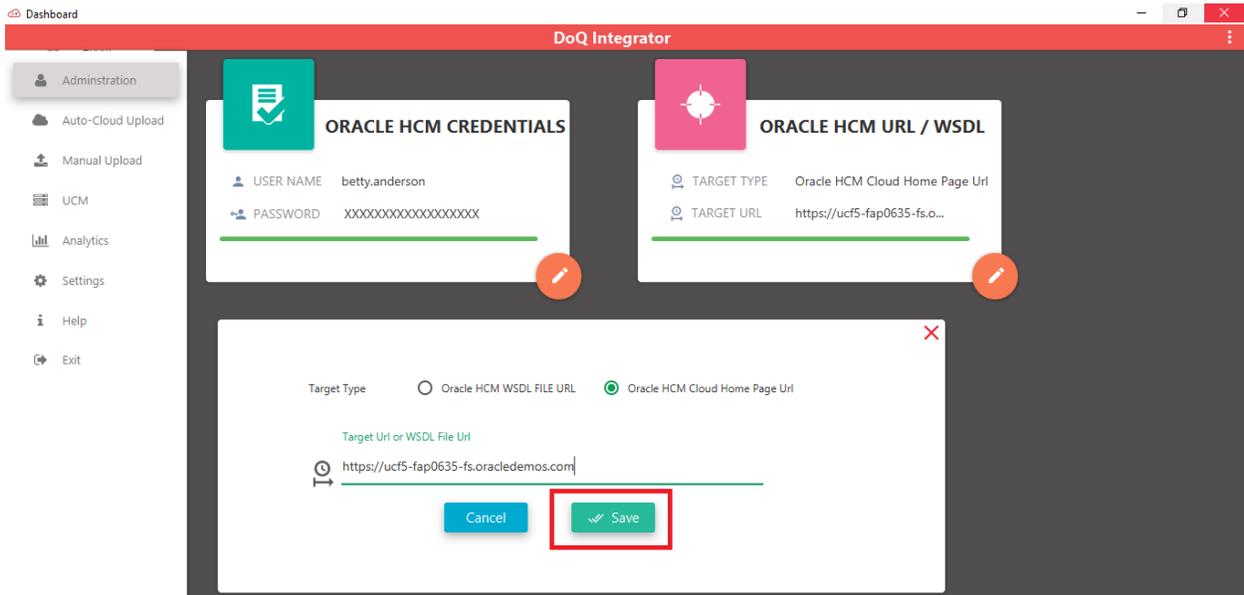
2. Under the Oracle HCM URL/WSDL section, click on the orange pencil icon



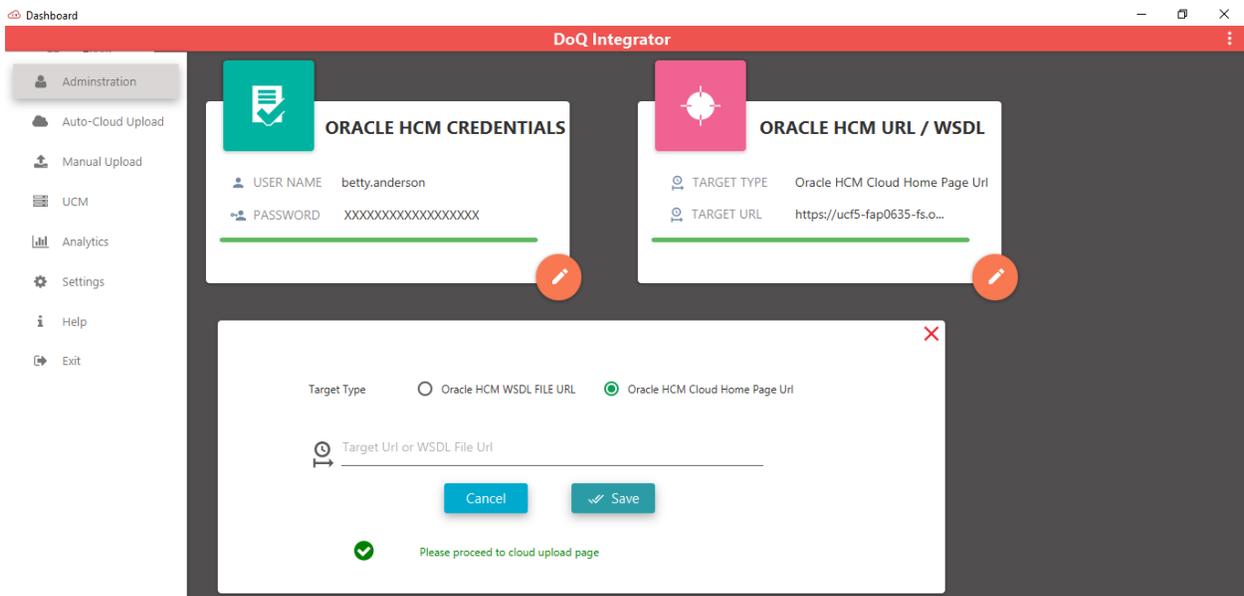
3. Once the pop-up appears, select the URL target



4. Enter the URL and click **Save** to save environment credentials



5. A success message is displayed if the URL is verified



Data Preparation

The source data needs to be prepared based on the type of upload (Auto-Cloud or Manual).

Preparing source folder for Auto-Cloud upload

Preparation of the source folder includes the following steps:

Step1: Create a new folder in your system

Step2: Place all the attachment files that need to be uploaded into the source folder

Step3: Download the following Excel sheet to the source folder: [Template](#)

Step4: Open the template in Excel and populate all six fields. Fill-in the 6 columns in the Excel sheet with document record data. The Fields are self-explanatory. In the template provided, line 16 and 17 are sample values to give an idea of what values to fill in and can be replaced with the person data that needs to be uploaded.

Please note

Additional info on template

Rows should be populated only after the header row containing the column heads DocumentType, PersonNumber, DocumentName, DateFrom, Title, File_PK are populated. Do not modify anything above this row. Excel file above could be created manually or using any other program. Place it in the folder containing other documents that are to be uploaded.

Explanation of the 6 fields

DocumentType: This could be any supported value as per the drop down

PersonNumber: This is person number from Oracle Fusion

DocumentName: This could be any meaningful text such as 'Passport' or 'Driving License'

DateFrom: 'Effective from' date to be included in Fusion for the person document

Title: Similar to the document name — US Passport, New York license etc.

File_PK: The exact file name that is being uploaded

Preparing source ZIP file for Manual Upload

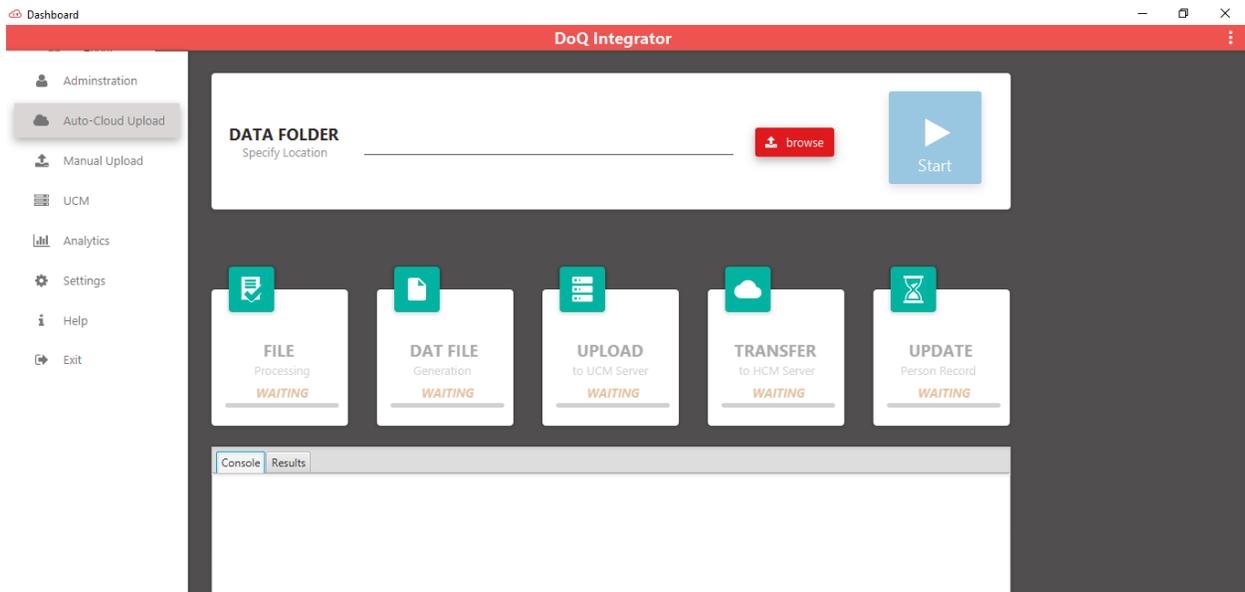
This step is not required if you are using the Auto Cloud Option. We recommend the Auto Cloud Option. 'Manual Upload' is an additional feature being offered in the tool. This option can be used when you have a use case to upload the already prepared the ZIP File (as specified in the Oracle Support Document: **Doc ID 2030116.1**). In the Auto Cloud option, the tool does all the work — prepares the ZIP file (as per the format required by Oracle) and performs pre-validations and processes it to HCM Cloud.

Upload Initiation

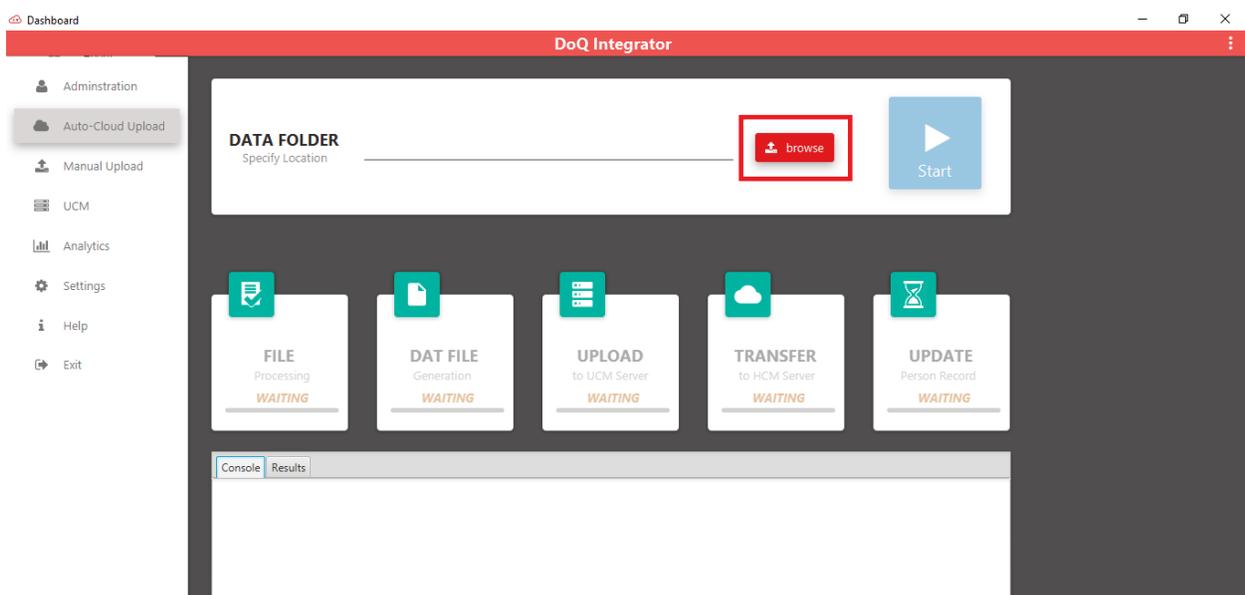
Click Auto Upload and select the folder containing files and click 'Start'. You can see the visual of the progress.

Below are the step-by-step instructions

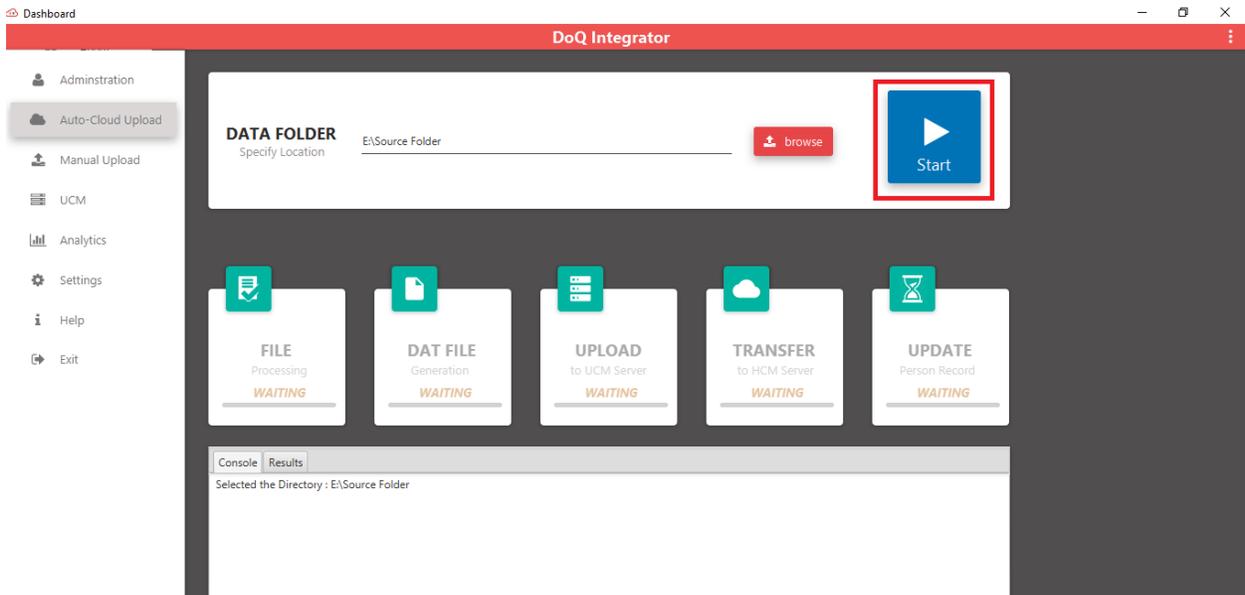
1. In the Navigation Pane, click on the **Auto-Cloud Upload** option



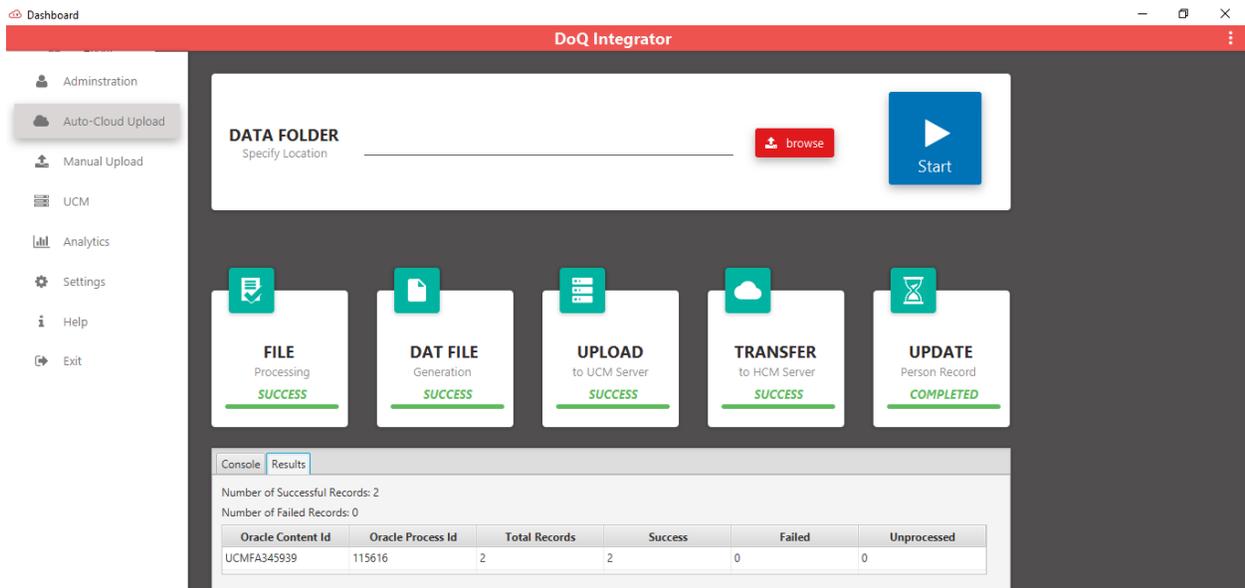
2. Click **Browse** to navigate to the source folder



- Once the appropriate folder is selected, click 'Start' to initiate the upload process

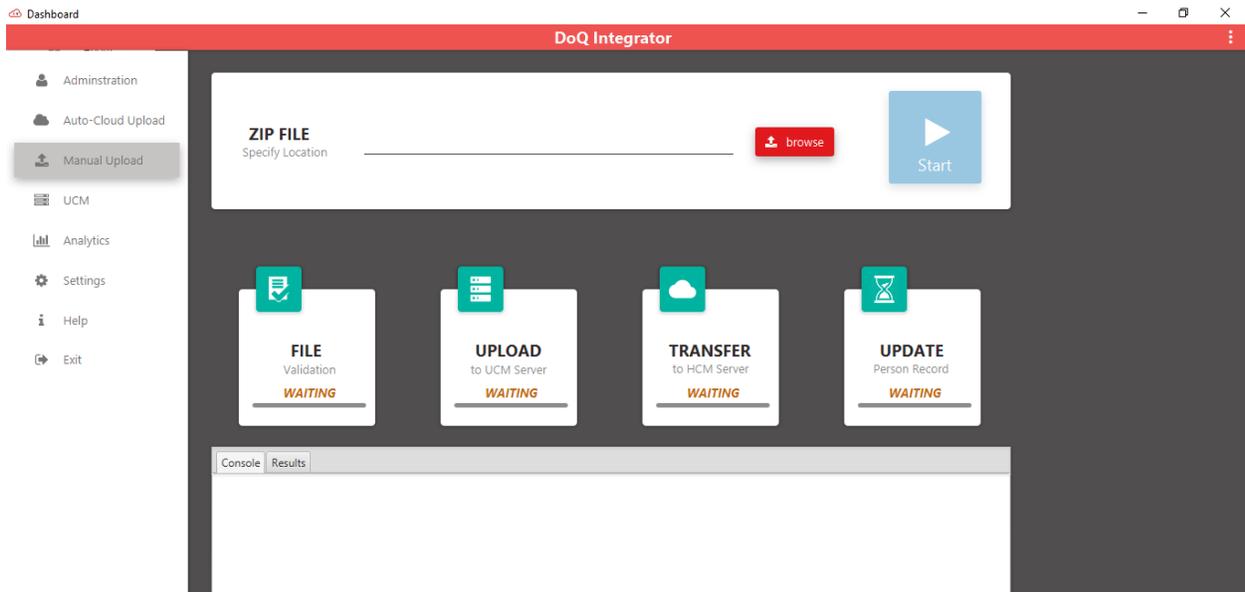


- Wait for the five stages to complete

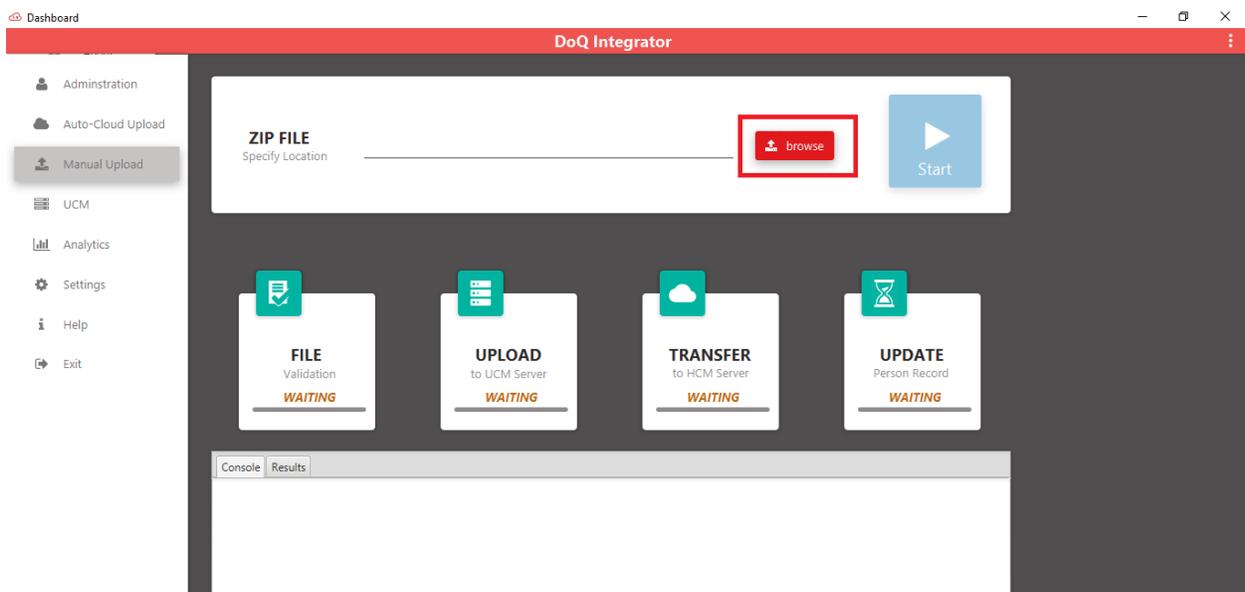


Initiating Manual Upload

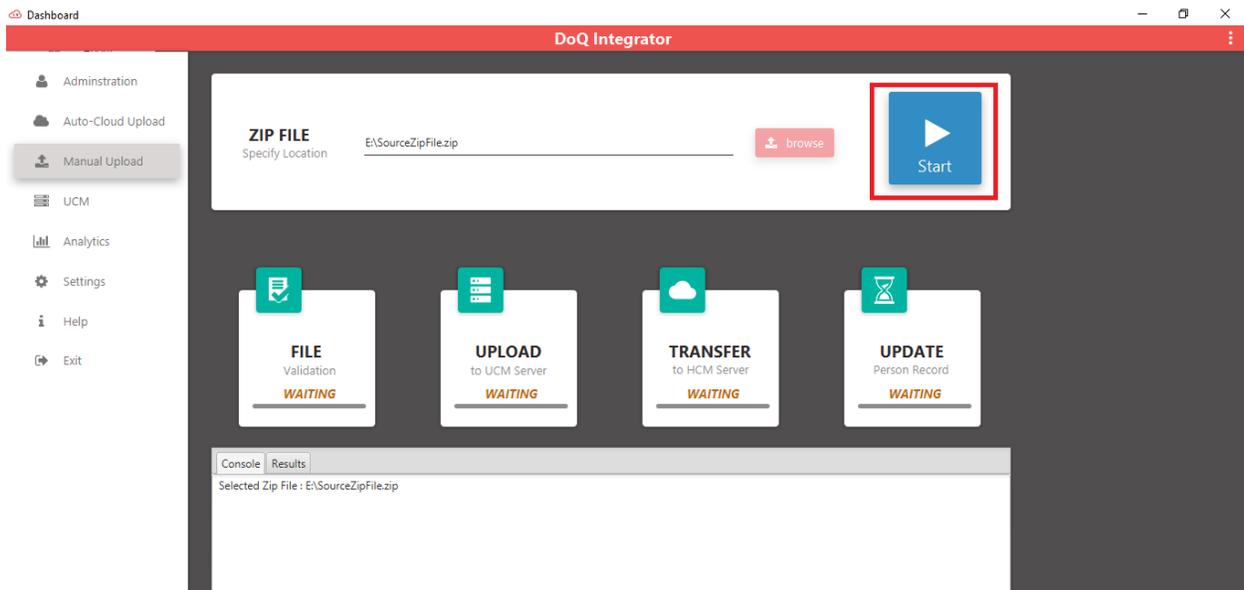
1. In the navigation pane, click on the **Manual Upload** option



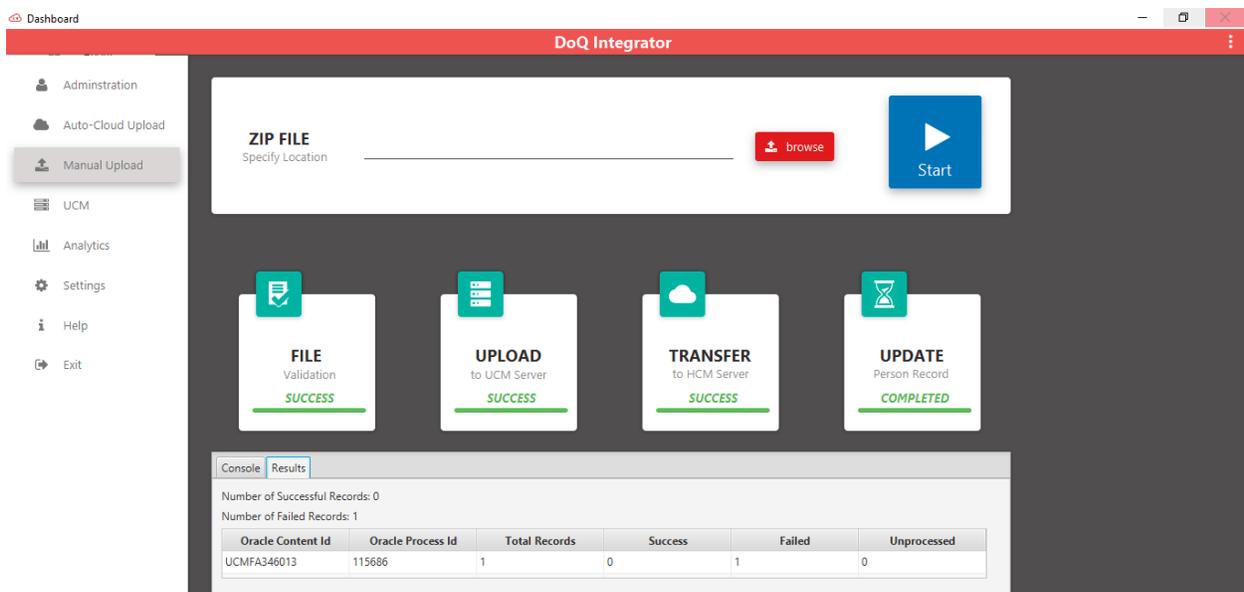
2. Click **Browse** to navigate to the source ZIP file



3. Once the appropriate folder is selected, click **Start** to initiate the upload process



4. Wait for the four stages to complete



Viewing Analytics of Data Load

1. In the navigation pane, click **Analytics**

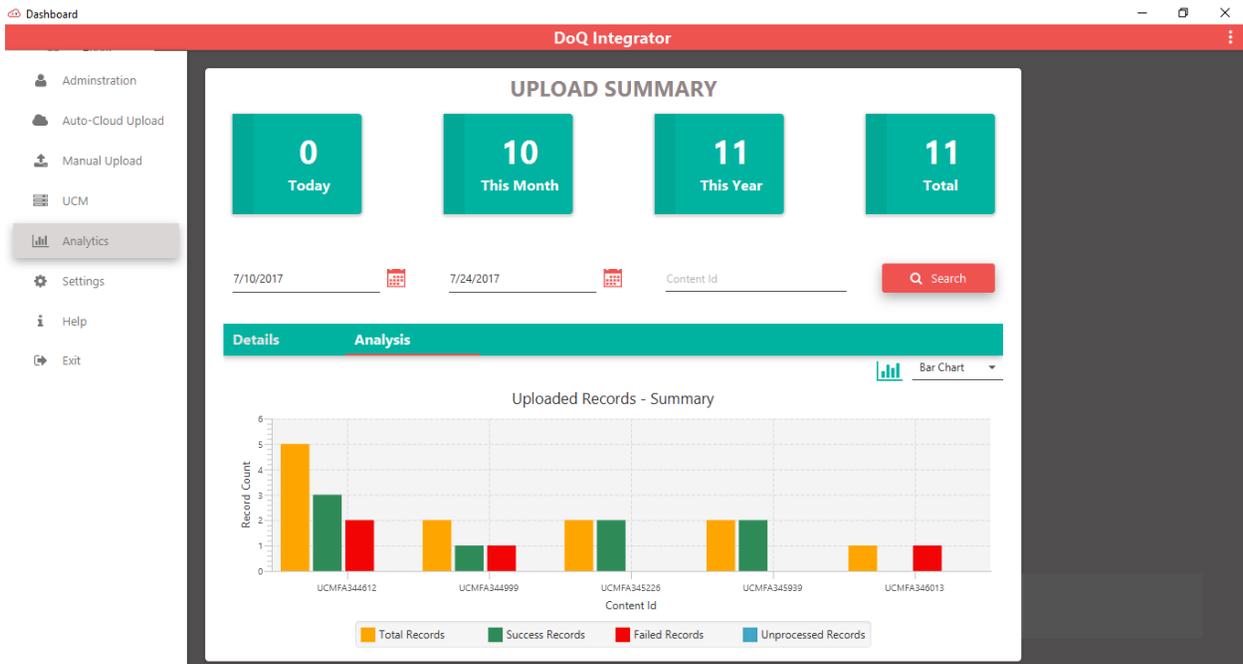
The screenshot shows the DoQ Integrator dashboard. The navigation pane on the left includes: Administration, Auto-Cloud Upload, Manual Upload, UCM, **Analytics**, Settings, Help, and Exit. The main content area is titled 'UPLOAD SUMMARY' and features four teal boxes with the following values: Today (2), This Month (10), This Year (11), and Total (11). Below these boxes are search filters for Start Date, End date, and Content Id, each with a calendar icon. A red 'Search' button is located to the right of the filters. At the bottom, there are two tabs: 'Details' (selected) and 'Analysis'.

2. Filter results using Content ID, Start Date, and End Date

The screenshot shows the DoQ Integrator dashboard with filters applied. The 'Today' count is now 0. The search filters are: Start Date (7/10/2017), End date (7/24/2017), and Content Id. The 'Search' button is highlighted with a red box. Below the summary, the 'Details' tab is active, showing a table with the following data:

Oracle Content Id	Oracle Process Id	Total Records	Success	Failed	Unprocessed
UCMFA344612	121456	5	3	2	0
UCMFA344999	113688	2	1	1	0
UCMFA345226	114051	2	2	0	0
UCMFA345939	115616	2	2	0	0
UCMFA346013	115686	1	0	1	0

3. Details View and the Analysis View



Generating list of files in UCM

1. In the navigation pane, click on UCM
2. You can filter UCM content by adding filter conditions

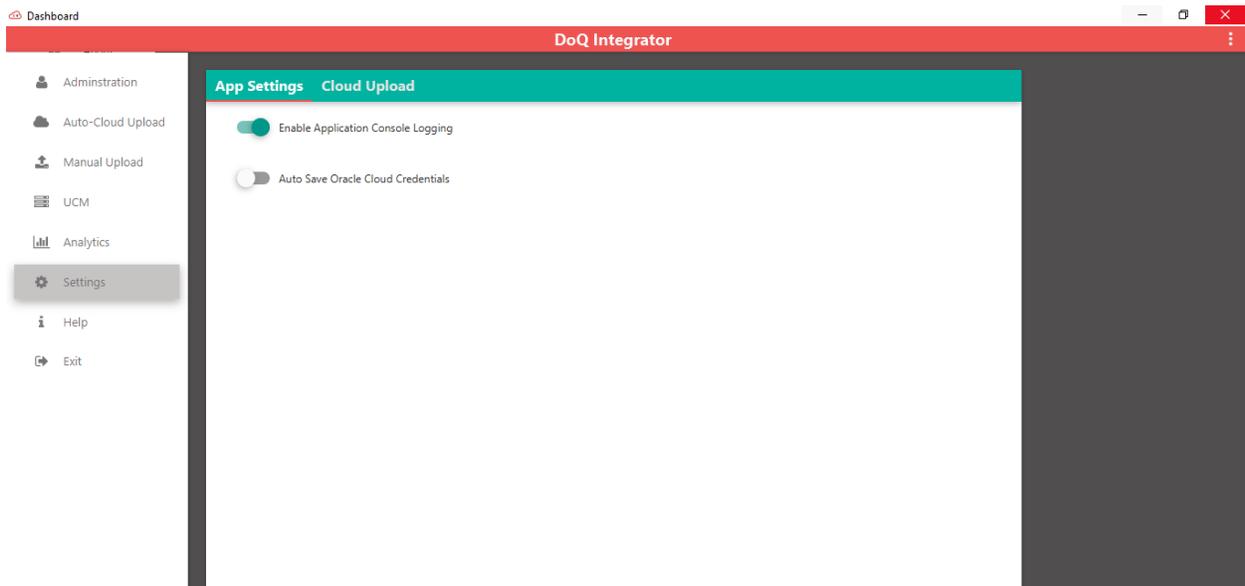
ORACLE UCM SERVER CONTENT DETAILS

7/5/2017 7/19/2017 Content Id Search

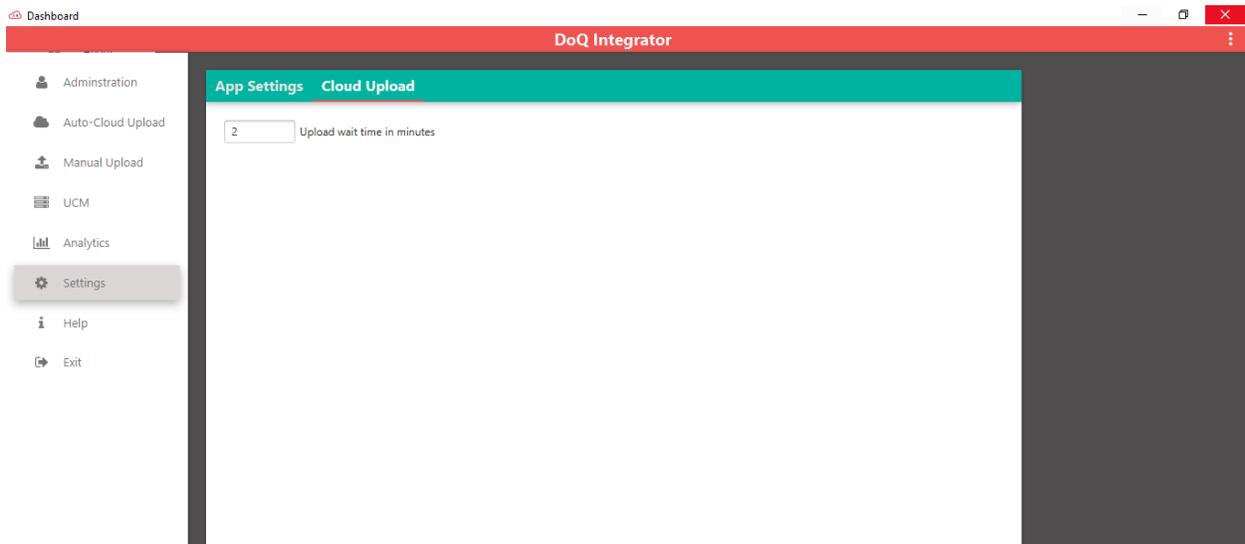
Title	Name	Original Name	Type	Author	Created Date
170718_2053	170718_2053	DailyRates_2.zip	Document	casey.brown	7/18/17 3:24 PM
HcmDataLoaderTempl...	UCMFA1900593	HcmDataLoaderTempl...	Document	FUSION_APPS_HCM_ES...	7/18/17 3:07 PM
Absence Management...	UCMFA1900592	Absence Management...	Document	FUSION_APPS_HCM_ES...	7/18/17 3:07 PM
PersonAccrualDetail.dat	UCMFA1900591	PersonAccrualDetail20...	Document	FUSION_APPS_HCM_ES...	7/18/17 3:07 PM
PersonEntitlementDeta...	UCMFA1900590	PersonEntitlementDeta...	Document	FUSION_APPS_HCM_ES...	7/18/17 3:07 PM
PersonAbsenceEntry.dat	UCMFA1900589	PersonAbsenceEntry63...	Document	FUSION_APPS_HCM_ES...	7/18/17 3:07 PM
PersonAccrualPlanEnro...	UCMFA1900588	PersonAccrualPlanEnro...	Document	FUSION_APPS_HCM_ES...	7/18/17 3:07 PM
Global Payroll.zip	UCMFA1900587	Global Payroll.zip	Document	FUSION_APPS_HCM_ES...	7/18/17 3:07 PM
CalculationCard.dat	UCMFA1900586	CalculationCard157651...	Document	FUSION_APPS_HCM_ES...	7/18/17 3:07 PM
RateDefinition.dat	UCMFA1900585	RateDefinition7459726...	Document	FUSION_APPS_HCM_ES...	7/18/17 3:07 PM
UserTable.dat	UCMFA1900584	UserTable63131444567...	Document	FUSION_APPS_HCM_ES...	7/18/17 3:07 PM
RateDefinitionTranslati...	UCMFA1900583	RateDefinitionTranslati...	Document	FUSION_APPS_HCM_ES...	7/18/17 3:07 PM
DepartmentCostAllocat...	UCMFA1900582	DepartmentCostAllocat...	Document	FUSION_APPS_HCM_ES...	7/18/17 3:07 PM
CostInfo.dat	UCMFA1900581	CostInfo543623930304...	Document	FUSION_APPS_HCM_ES...	7/18/17 3:07 PM
CostAllocationAccount...	UCMFA1900580	CostAllocationAccount...	Document	FUSION_APPS_HCM_ES...	7/18/17 3:07 PM
CostAllocation.dat	UCMFA1900579	CostAllocation7187851...	Document	FUSION_APPS_HCM_ES...	7/18/17 3:07 PM
PayrollInterfacelnboun...	UCMFA1900578	PayrollInterfacelnboun...	Document	FUSION_APPS_HCM_ES...	7/18/17 3:07 PM
PersonCostAllocation.dat	UCMFA1900577	PersonCostAllocation1...	Document	FUSION_APPS_HCM_ES...	7/18/17 3:07 PM
ValueDefinitionTranslat...	UCMFA1900576	ValueDefinitionTranslat...	Document	FUSION_APPS_HCM_ES...	7/18/17 3:07 PM

Changing the Settings

1. In the navigation pane, click on the **Settings** option
2. Here you have two types of settings:
 - App Settings
 - Cloud Upload Settings
3. The **App Settings** contains general application settings:
 - Enable Application Console Logging
 - Auto Save Oracle Cloud Credentials



4. The **Cloud Upload Settings** contains:
- Upload Wait Time in Minutes



For support queries or additional features or customizations, please drop an email to oracleteam@qburst.com with subject 'DoQ Integrator Support Query-Oracle Cloud Marketplace'.