



## Oracle Taleo Business Edition

# Oracle Taleo Business Edition (TBE) Employees to Oracle Learn Cloud Users data synchronization set up guide.

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## CONTENTS

Advisory .....	4
Overview .....	4
Things to Consider .....	5
Set Up Prerequisites .....	8
<b>Enable Learn for TBE Zone</b> .....	8
<b>Enable Oracle Learn Cloud Integration fields in TBE</b> .....	8
Oracle Learn Cloud Set Up Prerequisites .....	9
TBE to Learn Data Synchronization Configuration UI .....	10
TBE to Learn Data Synchronization Execution and History Log .....	12
Learn Application Integration Fields (Troubleshooting) .....	12
Field Mapping – TBE Employee to Learn User .....	14
Org Structure Mapping .....	16
Document History .....	17

## Advisory

- You should always ensure that you are working with the latest version of this document by getting the current version at this link:  
<http://www.oracle.com/technetwork/documentation/default-1841567.html>
- You should also review the Overview and Things to Consider section of this document to decide if this feature will work for your organization.

## Overview

It is recommended that you review this document before attempting to configure this feature.

NOTE: Requests to use this feature, initiated through an SR with Oracle Support, will be routed through an approval process before it can be enabled. See Set Up Prerequisites section of this document.

This feature can be set-up along with the TBE to Learn Single Sign On. The corresponding set up guide: *'Oracle Taleo Business Edition to Oracle Learn Single Sign On Set-Up Guide'* can be found at this link:

<http://www.oracle.com/technetwork/documentation/default-1841567.html>

The TBE Employees to Learn Users data synchronization is a self-service set up that may be enabled by a user/users with administration access to both TBE and Learn. Access to the Learn Data Synchronization configuration feature in TBE will only be visible if Learn Integration is enabled for the TBE Zone.

Once the configuration steps are completed. Employee records in TBE will periodically get synced with the Learn User records keeping the two systems in sync.

**NOTE:** *The sync can be set up to update the Learn User records in a particular Learn Center and a particular Learn Environment, for testing purposes. Once the Learn Center or Learn Environment is changed, the next scheduled execution will be to the new Learn Center and Learn Environment; the sync can be tested to a Learn staging environment first then deployed to a Learn production environment.*

The data synchronization will perform the following actions:

- Link any TBE Employee record with a Learn User record if the two match by Employee ID or Email address. Note: if more than one match is found, no link will be made.
- Create a new Learn User for any TBE Employee that does not yet have a corresponding Learn User, link the two records and add the Learn User as a member of the Learn Center specified in configuration.

- Update any Learn User that is already linked to a TBE Employee if the Employee record has been updated in TBE.
- Revoke a Learn User's membership in the Learn Center if the linked TBE Employee is de-activated in TBE.
- Refreshes the Organizational Structure (Supervisors/Supervisees) of the Learn Users in the Learn Center to reflect the TBE Employees Organizational Structure (Employees/Managers).

**NOTE:** If an Employee that has corresponding Learn Users is deleted in TBE, the corresponding Learn User will need to be manually removed from the Learn Center. Deletion of Employees in TBE is not recommended.

The data synchronization runs periodically, currently daily, at a time set up by the Administrator in TBE. A summary of the changes made as a result of each execution is logged in the History Log of the Learn Data Synchronization connection page.

If any issues are encountered during the execution. An Email will be sent to the user(s) designated in the Learn Data Synchronization connection configuration.

## Things to Consider

When considering whether or not to implement this feature, the following issues should be considered before moving forward.

### 1. Are your Employees already logging into Oracle Learn Cloud?

When TBE Employee to Learn User sync is enabled, existing Learn Users will be linked to TBE Employees if they are found to match by email address or Employee ID. [Employee ID on Learn Users may be set if you are also using TBE – Learn SSO and the user was created as a result of accessing Learn from TBE before the sync has ever executed).

Firstly, to avoid having 'duplicate' Learn Users created as a result of the sync and to ensure that TBE Employees are linked to the correct existing Learn User, a review of the data should be done before the service is enabled. The values of the email address on TBE Employees should match what is stored for email addresses on the Learn Users.

Secondly, for any existing Learn User that is linked to a TBE Employee, the Learn User's Learn Username will be set to the value of EWS Login from the TBE Employee. If these values are different between the two, the existing Learn User will be required to use the new Learn User name to access Learn directly.

### 2. Are your Employees accessing or will they access Oracle Learn Cloud using any Single Sign On (SSO) identity provider other than from TBE?

When TBE Employee to Learn User sync is enabled, any existing Learn User that is linked to a TBE Employee or any new Learn User that gets created from a TBE Employee will have their Learn Username set to the EWS Login of the TBE Employee.

If there is an SSO set up to Oracle Learn Cloud, you should ensure that the SSO connection (SAML Assertion) will continue to work and log the employees in as the correct user once the service is enabled and the sync has run.

### **3. Will you Employees need to login to Oracle Learn Cloud directly?**

When TBE Employee to Learn User sync is enabled, any existing Learn User that is linked to a TBE Employee or any new Learn User that gets created from a TBE Employee will have their Learn Username set to the EWS Login of the TBE Employee.

Employees accessing Learn directly will be required to use the value that is set from the TBE Employee EWS Login as their Learn Username. This may change how existing employees access Learn. You should ensure that the value is suitable for your business.

### **4. How will the process be audited - did the initial synchronization go as expected?**

When TBE Employee to Learn User sync is enabled and scheduled. The initial sync will occur around the time selected in the set-up. Once execution has occurred, a summary of the changes made successfully and unsuccessfully as a result are logged in the History Log of the connection in TBE – see the ***TBE to Learn Data Synchronization Execution and History Log*** section of this guide.

The History Log of the integration should be reviewed to validate that the following entries match expectations:

#### **Employees successfully linked to Learn Users**

- For those existing Learn Users for which there are corresponding TBE Employees, did those records get linked correctly; additional new Learn Users were not created.

#### **Employees successfully added as Learn Users**

- Does the number of new Learn Users created match the expected amount – taking into account that some may have not been created due to errors listed in the count of 'Employees unsuccessfully added as Learn Users

**If any issues are suspected the integration connection should be disabled until any discrepancies are resolved.** When the connection is re-enabled, any changes to the TBE Employee records in the interim will be considered in the subsequent execution of the synchronization process.



## Set Up Prerequisites

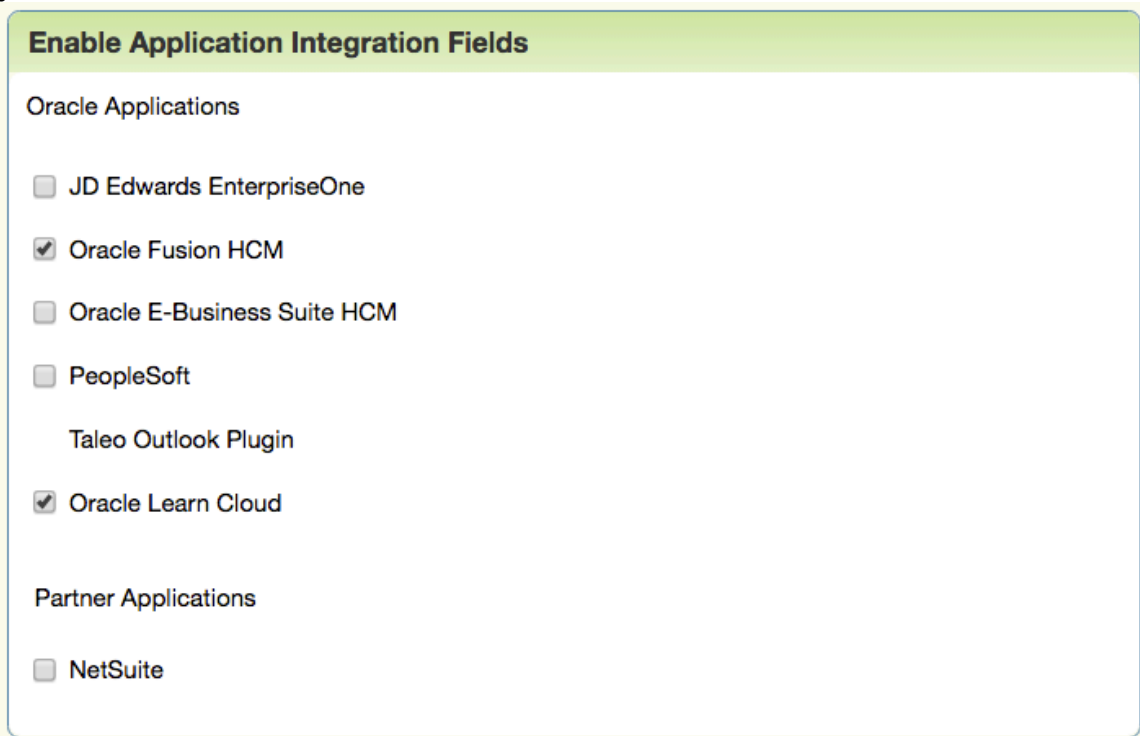
Before the TBE to Learn Data Sync can be set up, certain pre-requisite configuration will need to be performed on both TBE and Learn.

### Enable Learn for TBE Zone

- Customers must log a Service Request with Oracle Support providing their Learn URL and TBE Company Code requesting that the Learn Integration Service be enabled.
- Having the feature enabled to support the TBE Employee to Learn User sync requires an approval from Oracle. Based on the assessment of the customer's current usage pattern of the two applications, the request will be approved or the request will be denied with a suggestion to engage with an implementation partner to implement.

### Enable Oracle Learn Cloud Integration fields in TBE

- Once 'Learn Integration' is enabled for the TBE environment, the Administrator must check the 'Oracle Learn Cloud' option under Administration → System and Email Settings → Enable Application Integration fields. If an option for 'Oracle Learn Cloud' does not appear for the Administrators under Administration → System and Email Settings → Enable Application Integration fields, this feature has not been enabled for your TBE environment.



**Enable Application Integration Fields**

Oracle Applications

- JD Edwards EnterpriseOne
- Oracle Fusion HCM
- Oracle E-Business Suite HCM
- PeopleSoft
- Taleo Outlook Plugin
- Oracle Learn Cloud

Partner Applications

- NetSuite

- Once enabled, users with the Administrator role will have access to the UIs in TBE that allows them to configure the TBE to Learn Data Synchronization.



## Oracle Learn Cloud Set Up Prerequisites

Before a connection is set up in TBE, there is information that is required about the Learn environment that must be known. This will require first accessing the Learn environment to set up and retrieve the information. The TBE Administrator will need to have the Learn URL, Learn Center and the password of the Learn integration user ([WEBAPI\\_UserIntegration](#)). How this information is used in TBE to set up the configuration is covered in the TBE to Learn Data Synchronization Set Up section below.

**Base URL:** \_\_\_\_\_

**Learn Center URL Extension:** \_\_\_\_\_

Record the integration users password.

**Note:** The password for [WEBAPI\\_UserIntegration](#) will need to be set in Learn by a Learn Administrator and the user must be Active in Learn.

## TBE to Learn Data Synchronization Configuration UI

If Learn Integration service and the 'Oracle Learn Cloud' integration fields have been enabled for a TBE Zone, the TBE Administrators will have access to 'Learn Data Synchronization' under Administration→Organization. This is where the connection to the integrated Learn Center will be specified.

### Administration: Organization Setup [Back To Administration](#)

Configure and maintain your locations, company information and system settings.

- **Company Profile** : Configure company information and default settings.
- **System & Email Settings** : Configure system options and email settings.
- **Security Level** : Configure system security level currently set to **Low**.
- **Single Sign-On** : Configure Single Sign-On Service
- **Fusion Integration** : Configure Fusion HCM Integration
- **Region, Location, Division and Department Settings** : Configure company Regions, Locations, Divisions and Departments
- **Learn Integration** : Configure Learn Integration
- **Learn Data Synchronization** : Set-up the TBE Employee to Learn User data Synchronization

Following the 'Learn Data Synchronization' link will take the TBE Administrator to the 'Learn Integration: Data Synchronization Setup' UI where the Administrator will enter the information for the Learn environment and Learn Center to which the TBE Employees will be synced to Learn Users.

**NOTE:** Before setting up the connection to Learn for data synchronization, some pre-requisites are recommended.

- Know the Base URL to the Learn Environment
- Know the Learn Center URL Extension to the Base URL for the Learn Center into which the Learn Users will be inserted.
- Know the username and password of the Learn User who has permissions to use the integration APIs. (Currently: [WEBAPI\\_UserIntegration](#))
- It is also recommended that you create a new System Email Template that will be used to notify selected TBE Users when issues are encountered with the integration.

You will not be allowed to save the connection as Active unless the Base URL, URL Extension, username and password are correct. The system will validate these values before allowing you to save the active connection. You may save the connection as Inactive/Disabled at anytime without this validation occurring.

To complete your Learn Connection: Data Synchronization Set-up, complete the following (See UI below):

## Steps:

1. Click on Edit button to open the connection configuration for edit/input.
2. Enter the URL of the Learn Environment in the Base URL field. Example: <https://learn-mycompany.us.oracle.com> or <https://mycompany.learn.taleo.net>
3. Enter the Learn Center URL Extension for the Learn Center to which the TBE Employees should sync as Learn User members. (This Learn Center should exist and be active prior to configuration of the connection). For example: home, home/mylearncenter etc.
4. Enter the User name and Password of the Learn integration user.
5. Select a time of day when you prefer the TBE Employee to Learn User Sync to execute by selecting a time from the Schedule pick-list.
6. Select one or more TBE Users who would be notified via email when an issue is detected with the data synchronization process.
7. Check the Enable email notifications check box and select the Email Notification Template that should be used. (If you do not yet have a template created, you may return and complete steps 6 and 7 later).
8. If you want to save the connection as Active and have the data synchronization happen on the next scheduled time, click the Enabled check-box and click the Save button. You may also save as Inactive/Not Enabled and enable at a later date.

**Learn Connection: Data Synchronization Set-up** [Back to Organization Setup](#)

Use this screen to set up your Taleo Business Edition Employee to Oracle Learn Cloud User data synchronization.

Before you start, you should:

1. Determine the base URL of your Oracle Learn Cloud environment.
2. Determine the Learn Center extension to the base URL for the Learn Center TBE to which TBE is connecting.
3. Determine the username and password of the user who will connect to the Oracle Learn Cloud APIs.

**Save** **Cancel** **Reset**

**General Properties:**

**Base URL:**

**Learn Center URL Extension:**

**User name:**

**Password:**

Enabled:

**Schedule**

Select the best time to have data synchronization performed:

Initiate process at this time daily:  (GMT) Greenwich Mean Time (GMT0)

**Integration Managers** Red = Required Information

Assign users to manage integration connection. At least one manager is required.

**Associated Users:** [\[ add/edit \]](#)

**Notifications** Red = Required Information

Set up email notification options for integration failures.

Enable email notification

Notification Template:

**Save** **Cancel** **Reset**

## TBE to Learn Data Synchronization Execution and History Log

Once an **Active** Learn Integration: Data Synchronization Set-up has been saved. The process of the synchronization of TBE Employee records to Learn User records will initiate at the earliest opportunity after the time selected in the connection configuration.

Each time the job executes, daily at the selected time, the History Log of the connection (Administration → Learn Data Synchronization → History Log) is updated with entries reflecting the activity, a summary of all changes made successfully and unsuccessfully as well as whether any email notifications were sent to TBE Users to notify them of any issues encountered. See below example.

6/20/16 3:15 AM	Email message <b>Learn Sync Issues Detected</b> sent to mark.cook@oracle.com	<a href="#">View</a>
6/20/16 3:15 AM	TBE Employee to Learn User Sync completed	
6/20/16 3:15 AM	Learn Org Structure Refresh Completed	
6/20/16 3:15 AM	Learn Org Structure Refresh Initiated	
6/20/16 3:15 AM	Employees successfully linked to Learn Users: 0 Employees unsuccessfully linked to Learn Users: 0 Employees successfully added as Learn Users: 0 Employees unsuccessfully added as Learn Users: 0 Employees successfully updating Learn Users: 0 Employees unsuccessfully updating Learn Users: 1 Employees successfully deactivating Learn Users: 0 Employees unsuccessfully deactivating Learn Users: 0	
6/18/16 4:00 PM	TBE Employee to Learn User Sync initiated	

If a user is receiving an email indicating of an issue with the process, they should first consult the History Log of the connection to determine the nature of the problem.

If the problem is isolated to one or more Employees, and not the connection itself, some additional fields have been made available on the Employee record to trouble shoot further.

## Learn Application Integration Fields (Troubleshooting)

A number of Application Integration Fields specific to the TBE to Learn Integration have been added and are available from the Employee entity when the Oracle Learn Application Integration fields have been enabled for this feature.

- Learn User ID – the ID of the Learn User linked to the TBE Employee
- Learn Membership ID – the membership ID of a TBE Employee in the integrated Learn Center

- Learn Supervisor Account ID – the Supervisor Account ID of the Learn User, in the Learn Center, if any to which it's Supervisees and tied (Used to maintain matching Org Structure in both TBE and Learn).
- Learn Last Sync Status – This field will contain 'Failed' for the TBE Employee if for any reason their Learn User cannot be Linked, Created, Updated or Deactivated.
- Learn Sync Failed Reason – This field will contain the reason the TBE Employee cannot currently be synced to Learn.
- Learn Last Sync Timestamp – The last time the TBE Employee was successfully synced to Learn.

These fields, along with other Employee fields, can be included in List Views and Custom Reports to track the current Learn Integration status of individual Employee records. In particular for those with 'Learn Last Sync Status' = 'Failed', user will be able to see the 'Learn Sync Failed Reason' and take any actions necessary to resolve the issues before the next scheduled job execution.

Example report tracking currently Failed TBE Employee records:

Reports will return a maximum of 20,000 rows of data.

Modify Parameters   Edit Report   Edit Layout   Access BIP

Employees - Id	Employees - First Name	Employees - Last Name	Employees - Learn Last Sync Status	Employees - Learn Sync Failed Reason
57	Mark-Thomas	Cook	Failed	API: User (Update). Reason: Status Code 409, Status: Conflict, Title: The provided username is already taken.

## Field Mapping – TBE Employee to Learn User

The table below shows the mapping of the TBE Employee fields to the Learn User fields.

**NOTE:** A Learn User’s membership in the Learn Center will be maintained based on the TBE Employee’s Status.

- If TBE Employee Status is an Active status, the Learn User will be assigned a membership status of ‘Approved’ in the Learn Center.
- If TBE Employee Status is **not** an Active status, the Learn User will be assigned a membership status of ‘Removed’ in the Learn Center.

TBE Employee	Learn User	Notes
Learn User ID	User ID	Null for Create User
ewsLogin	<b>Username</b>	<b>Required field.</b>
firstName	First Name	
lastName	Last Name	
address	Street 1	
city	City	
zipCode	Postal_Code	
state	State	Display Name of State
country	Country	Display Name of Country
phone	Daytime Phone	
cellPhone	Mobile Phone	
email	E-Mail	
gender	Gender	Values: male, female If value in TBE is ‘Choose not to disclose’ no value is sent. <b>Note:</b> For non-English zones, the integration codes ‘male’ and ‘female’ will need to be set for the Pick-list values in the TBE Employee Gender field.
ssn	SSN	
employeeId	EmployeeId	
location	Office	Display name of Location
department	Department	Display name of Department
jobTitle	Job_Title	
jobCode	Profession	
manager	Manager Name	



## **Org Structure Mapping**

The Org Structure in the Learn Center, Supervisor/Supervisee relationships, will reflect the Org Structure in TBE, Manager/Employee relationship.

- Any TBE Employee selected as Manager on one or more TBE Employee records will have a Supervisor Account in the Learn Center.
- All TBE Employees with a Manager selected will be assigned as Supervisees to the Managers Supervisor Account in the Learn Center.
- If a TBE Employee previously had direct reports in TBE but dose not currently have direct reports, their Supervisor Account will be removed from the Learn Center.



## Document History

Date	Changed By	Comments	Version
6/27/2016	Mark Cook	Initial version	16B1V1
10/13/2016	Mark Cook	<ul style="list-style-type: none"><li>• Clarified that the password for the Learn API user needs to be set in Learn by a Learn Administrator.</li><li>• Clarified what information needs to be provided in the Service Request to Oracle Support to enable the Learn Integration service in TBE.</li><li>• Added Things to Consider section.</li><li>• Adding note that target Learn Environment and Learn Center can be changed after sync has executed to point to a new Learn environment.</li></ul>	16B2V1
10/27/2016	Mark Cook	<ul style="list-style-type: none"><li>• Added additional points to Things to Consider.</li></ul>	16B2V2
11/08/2016	Mark Cook	<ul style="list-style-type: none"><li>• Included notes that requests to enable must be approved by Oracle before the service is enabled.</li></ul>	16B2V3
11/23/2016	Mark Cook	<ul style="list-style-type: none"><li>• Added note on setting up Gender pick-list for non-English zones.</li></ul>	16B2V4