Oracle Fusion Cloud Talent Management

How can I use guided journeys to view additional information about succession plan candidates?

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Contents

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Some application pages have help icons to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

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Thanks for helping us improve our user assistance!

1 How can I use guided journeys to view additional information about succession plan candidates?

Overview

Viewing additional information about succession plan candidates can help plan owners to take informed decisions.

Based on this information, plan owners can modify the readiness of the candidates, plan for their development, and determine if the candidates need to be retained in the plan or not. Here's what you need to do so that plan owners can view additional information about candidates:

1. Create an Oracle Transactional Business Intelligence (OTBI) analysis with a column that stores the Person ID attribute.
2. Save this analysis in a shared custom folder.
3. Configure a guided journey for the succession plan candidate OTBI analysis and activate it.
4. Edit a succession plan page in Visual Builder Studio.
5. Set the page properties for the Candidates section guided journey and task with the appropriate guided journey codes.
6. Preview your changes and publish.

Create an Oracle Transactional Business Intelligence Analysis

Oracle Transactional Business Intelligence (OTBI) helps you query your business data and create analyses to answer your business questions.

Here's how you can create an analysis to find details of an employee:

1. Sign in to OTBI.
2. Under Create, click **Analysis**.

3. Select a subject area.

   Here are some subject areas that you can use:

   - **Compensation - Workforce Compensation Real Time**: Provides compensation data.
   - **Workforce Management - Areas of Responsibility**: Provides the responsibilities of a person.
   - **Workforce Management - Person Seniority Real Time**: Provides information on person-level seniority dates.
   - **Workforce Management – Worker Assignment Real Time**: Provides current assignment information for an employee.
   - **Workforce Performance - Performance Rating Real Time**: Provides information on an employee's performance ratings in a performance document.
   - **Workforce Profiles - Person Profile Real Time**: Provides person profile details related to educational degrees, competencies, career preferences, membership, certifications, languages, potential, and risk of loss.
4. Add the columns that you want to include in the analysis. Remember to add a column with the Person ID attribute in the analysis.
5. Add the Person ID attribute as a filter of type is prompted.
6. Click the Results tab to see the results of the analysis.
7. Save the analysis in a shared custom folder, for example **/shared/Custom/Human Capital Management/TRSM/** folder.

Create Succession Plan Candidates Guided Journey

Use guided journeys to provide more guidance about the task the users are doing.

Here's how you can create a guided journey for getting information about succession plan candidates:

1. Use the **Guided Journey** quick action under My Client Groups.

   > **Note:** You can use this quick action if your administrator has enabled the ORA_PER_GUIDED_JOURNEYS_SETUP_REDWOOD_ENABLED profile option.

2. On the Guided Journey overview page, click **Create**.
3. In the New Journey panel, do these actions:
   a. Select **New** as the creation method.
   b. Enter a name for the guided journey.
   c. A code is automatically generated. You can update it. Note this code. For example, **SUCC_PLAN_CAND_DETAILS**.
   d. Click **Create Draft**.
4. In the Tasks section of the Overview tab, add a task.

5. In the New Task panel, do these actions:
    a. Specify the task name and description.
    b. Set status as **Active**.
    c. A code is automatically generated. You can update it. Note this code. For example, **SELECTED_CANDIDATES_OTBI_ANALYSIS**.
    d. Select the **Task Type** as **Analytics**. The **Type of Analytics** field defaults to **OTBI Analysis**. Don't change the value of this field
    e. In the **OTBI Analysis Path** field, specify the path to the shared custom folder in which you saved the employment info analysis in this format `{Path}/{Report_Name}&col1= "<dimension name>"."<name of the person id attribute>".`
    f. Click **Save**.
6. Activate the guided journey.

Add Guided Journey in Candidates Section

You use the guided journey page properties in Visual Builder Studio to configure guided journeys on a page.

Here's how you can add the created guided journey in the Candidates section of a succession plan:

1. Edit a succession plan page in Visual Builder Studio.
2. Select a project.
3. Set the value of the **Set Guided Journeys Code at the Candidates Section Level** page property to the succession plan candidates guided journey code. For example, **SUCC_PLAN_CAND_DETAILS**.
4. Click the + icon next to the **Set Guided Journeys Task Codes at the Candidates Section Level** page property.
5. Enter the code that you noted for the task of the succession plan candidates guided journey. For example, **SELECTED_CANDIDATES_OTBI_ANALYSIS**.
6. Preview your changes and publish.

View Additional Information for Succession Plan Candidates

After your administrator has configured the guided journey and task page properties of a succession plan, you can view it in the Candidates section of the plan.

Select candidates for whom you want to view the details and click the guided journey link. You can see the additional information in a panel.