

# Oracle Fusion Cloud Talent Management

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**How can I use guided journeys to view additional information about review population members?**

FA Latest



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# Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

## Get Help in the Applications

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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For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program](#). Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

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We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to [oracle\\_fusion\\_applications\\_help\\_ww\\_grp@oracle.com](mailto:oracle_fusion_applications_help_ww_grp@oracle.com).

Thanks for helping us improve our user assistance!

How can I use guided journeys to view additional information about review population members?

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# 1 How can I use guided journeys to view additional information about review population members?

## Overview

View additional information about talent review members and enhance your talent review process.

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 Talent Review member OTBI analysis and activate it. Note the guided journey codes.
4. Edit a Talent Review meeting dashboard page or the table view in Visual Builder Studio.
5. Set the page properties for the page level 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 Guided Journey to View Member Details

Use the **Analytics** task type in guided journeys to view information from an Oracle Transactional Business Intelligence (OTBI) analysis.

Here's how you can create a guided journey for getting information about review population members:

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, **TALENT\_REV\_MEM\_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\_MEMBER\_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}&coll= "<dimension name>". "<name of the person id attribute>"&vall={SelectedPersonIds}`.
  - f. Click **Save**.
6. Activate the guided journey.

## Add Guided Journey on a Talent Review Meeting Dashboard

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 on the Talent Review meeting dashboard:

1. Edit a Talent Review meeting dashboard page in Visual Builder Studio.
2. Select a project.
3. Set the value of the **Set Guided Journeys Code** page property to the code of the guided journey created for viewing the details of the review population member. For example, **TALENT\_REV\_MEM\_DETAILS**.
4. Click the + icon next to the **Set Guided Journeys Task Codes** page property.
5. Enter the code that you noted for the task of the succession plan candidates guided journey. For example, **SELECTED\_MEMBER\_OTBI\_ANALYSIS**.
6. Preview your changes and publish.

## View Additional Information About the Review Population Members

After your administrator has configured the guided journey and task page properties for the Talent Review meeting dashboard, you can use it to view more information about 1 or more review population members.

Select the review population members for whom you want to view more details and click the **Guide Me** button. You can see their additional information that's configured in the Oracle Transactional Business Intelligence (OTBI) analysis associated with the guided journey in a panel.

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