Oracle Fusion Cloud Human Resources

Implementing and Using Journeys

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Author: Santosh Radhakrishnan

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1 Overview

Overview of Journeys

A journey is a collection of tasks to facilitate a business process.

You can configure a journey with one or more tasks with each task having its own performer. You can assign the journey to workers during their personal and professional transitions. Tasks help workers when they experience an event, be it work related, such as transfer or personal, such as an update to their marital status. Irrespective of the journey category, journeys enables all stakeholders involved in a journey to track and manage their tasks effectively.

You can create a journey by building on an existing template or create a brand new template. A journey can be assigned manually or automatically. You can assign a journey to other people or assign it to yourself.

These are some journey categories that you can use for specific purposes:

- **Contextual Journeys** to configure tasks that need to be performed by different performers before a HR transaction. For example, tasks that a manager needs to do before a transfer action.
- **Guided Journeys** to support users by providing guidance, such as tutorials, company policies, and best practices in the context of an HCM flow. For example, tasks to help a line manager transfer an employee.
- **Survey Journeys** to create a survey and assign it to people in your organization. For example, regular pulse surveys to seek feedback on workplace satisfaction or a general survey to provide feedback on the onboarding process.

Overview of Implementing Journeys

Use this module to configure journeys and its tasks, including integrations with external vendors.

This table specifies the primary features of this module.

Task	Feature Details	Topic or Guide
Enable Profile Options	Manage journey related profile options as required, to meet your requirements.	Refer to the Journey Profile Options topic in this guide.
Review Lookups	Create or update lookups related to journeys and have user or extensible configuration levels. You review lookups using the Checklist Lookups task in the Setup and Maintenance work area.	Refer to the Journey Lookups topic in this guide.
Review and Configure Categories	Create or update categories for configuring journey templates.	Refer to the Journey Categories topic in this guide.

Task	Feature Details	Topic or Guide
Configure Eligibility Criteria	Link an eligibility profile at the journey template level or at the task level to determine to whom the template or task is applicable.	Refer to the Eligibility Profiles for Benefits and Other Objects chapter in the Implementing Benefits guide.
Configure Fast Formulas	Create fast formulas and associate to an eligibility profile, in case you are using Activation Criteria for journey tasks.	Refer to the Fast Formulas chapter in the Implementing Global Payroll guide.
Configure Questionnaires	You use the questionnaire functionality in HCM to create a questionnaire and select the appropriate subscriber depending on the journey category. • Survey - Journey Surveys • Guided Journey - Guided Journeys • Other categories - HR Checklists	Refer to the Questionnaires chapter in the Implementing Performance Management guide.
Configure Integrations	Configure these integrations depending on the integration used in your organization: • Native eSignature • DocuSign • HireRight for I-9 Process • Oracle Process Automation - Enables you to extend journeys and create Process Automation tasks for automating certain business processes in your organization.	For more details about Oracle Process Automation, refer to the Integrate with Applications and Services chapter in the Using Oracle Cloud Infrastructure Process Automation guide.
Configure Alerts for Notifications	Review seeded or modify alert templates to use in your journeys.	Refer to the Alerts Composer chapter in the Using Common Features for HCM guide.
Configure BI Publisher Templates	• Review seeded or modify BI publisher templates to use for journey notifications. • Create BI Publisher templates for use in eSignature and Report task types.	Refer to the Oracle Business Intelligence Publisher User's Guide.
Configure OTBI Analysis	Create OTBI for use in guided journeys.	Refer to the Subject Areas for Transactional Business Intelligence in HCM guide.
Configure Task Library	Create tasks in a task library from which you can select and add tasks to a journey template or an assigned journey.	Refer to the Task Library topic in this guide.
Configure Task Groups	Configure a task group that you can reuse in multiple journey templates.	Refer to the Configuring Task Groups topic in this guide.
Configure Templates	Create a journey template according to your requirements.	Refer to the Templates topic in this guide.
Configure Tasks	Configure tasks of different task types that a task performer needs to complete in a journey.	Refer to the Configuring Task Types topic in this guide.

Task	Feature Details	Topic or Guide
Configure Security	• Roles and Privileges • Category Security • Template Security	Refer the Security Reference for HCM guide.

2 Prerequisites for Journeys

Journey Profile Options

You can configure journey-related profile options as required, to meet your requirements. For more information, refer to this topic: *What are the profile options available for journeys?*

Journey Lookups

This topic identifies lookups related to onboarding and have user or extensible configuration levels. Review these lookups, and update them as appropriate to suit your requirements. You review lookups using the Checklist Lookups task in the Setup and Maintenance work area.

Checklist Lookups

Here's a list of checklists lookups you can use:

Lookup type	Description	Configuration Level
CHECKLIST_CATEGORY	Categories of checklists, such as on boarding and off boarding.	Extensible (not in use)
ORA_PER_CHK_SUB_CATEGORY	Sub category of a checklist.	Extensible (not in use)
ORA_PER_CHK_TASK_ACTION_LIST	Supported application task list for a checklist task.	Extensible (not in use)
ORA_PER_CHK_TASK_CATEGORY	Category of task in the task library.	Extensible
ORA_PER_ONB_CONTACT_TITLE	Title of the onboarding sponsor.	Extensible
ORA_PER_ONB_CONTENT_CATEGORY	Content category indicates the onboarding event.	Extensible
ORA_CHK_SURVEY_CATEGORIES	Types of survey categories.	Extensible

Journey Categories

This table shows the different journey categories delivered in the application and their specific usage and considerations.

Category	Usage	Points to Consider
Career Development	To configure tasks that need to be performed by workers to excel in their current roles and for career growth. For example, tasks related to learning, skill development, and career mobility. You must configure this category as part of implementing Oracle Grow.	• You can create global journey templates for this category. • Global templates are displayed on the Explore tab. • These are displayed on the My Journeys, and Assigned Journeys tabs. • You can create personal journeys templates for this category. • Journey templates of this category are visible on the Grow page. • When you create a journey in Oracle Grow, you can save it as a personal journey template for reuse later by using the **Save as personal journey template** option. • The saved personal journey template in Oracle Grow is displayed on the Explore tab. • If you create a personal journey with the same name as that of an existing journey, then the name will be suffixed with (n) where n is the instance number. For example, Learning Journey (2). • You can associate skills and qualifications with journey templates for this category from the Relationships tab on the checklist template page. • You can configure to automatically update the person's talent profile when they complete an assigned career development journey. For example, if you associate skills and qualifications with the career development journey template and enable the **Write to person profile on completion** option, the person can view the journey outcome in their talent profile after they complete the assigned career development journey. • Consider this scenario. You configure an outcome for a task by enabling the **Write to person profile on completion** option. In this case, if the task expires, then the person profile isn't updated for the worker. The person profile is updated only when a journey task has the COM status.

Category	Usage	Points to Consider
Contextual Journey	To configure tasks that need to be performed by different task performers before a HCM transaction. For example, tasks that a manager needs to do before a transfer action.	• Journey templates of this category aren't displayed on the Explore tab. • Journeys of this category can be assigned to workers, but are not displayed on the My Journeys and Assigned Journeys tabs. This is because contextual journeys aren't standalone journeys, they are always triggered in the context of a quick action transaction. However, tasks in such journeys are visible on the My Tasks tab. • Personal journey templates of this category can't be created.
Enterprise onboarding	To configure journey to onboard new hires either before, on, or after their joining date. For example, Oracle – Onboarding Process.	• Journeys of this category were designed to be displayed on the responsive Onboarding page. The Journeys App no longer has this requirement. Hence, journeys of this category are no longer recommended when using Journeys. • Journey templates of this category are displayed on the Explore tab. • Journeys of this category can be assigned to workers, and they are displayed on the My Journeys and Assigned Journeys tabs. • Personal journey templates of this category can't be created. • This is the only journey category that supports phases.
Enterprise onboarding step	To configure onboarding tasks that new hires need to complete during the onboarding process. These need to be associated to an enterprise onboarding category template.	• Journey templates of this category aren't displayed on the Explore tab. • Personal journey templates of this category can't be created. • Journeys of this category can't be directly assigned.
Gatekeeper law	Predefined gatekeeper law journey template that can be assigned to workers. This journey includes statutory tasks for compliance with the Gatekeeper Law, to support the reintegration of the employee back into the workforce after long-term or related sickness absences. This journey is assigned automatically when a specific absence type is recorded for a worker whose legal employer is in The Netherlands. This template can't be deleted or made inactive because it would impact the absence processing feature for workers in The Netherlands.	• Journey templates of this category are delivered by the localization team especially for managing sickness in Netherlands. • Journey templates of this category are displayed on the Explore tab. • Journeys of this category can be assigned to workers, and they are displayed on the My Journeys and Assigned Journeys tabs. • Personal journey templates of this category can't be created.

Category	Usage	Points to Consider
Guided Journey	To provide guidance, such as tutorials, company policies, and best practices in the context of an HCM flow using guided journey tasks. For example, tasks to help a line manager transfer an employee.	• Journey templates of this category aren't displayed on the Explore tab. • Journeys of this category can't be assigned. • Journeys of this category aren't displayed on the My Journeys and Assigned Journeys tabs. • Personal journey templates of this category can't be created.
Survey	To configure a survey journey to answer a questionnaire. For example, you want to send this survey to new hires who join the organization from September to October.	• Journey templates of this category are displayed on the Explore tab. • Journeys of this category can be assigned to workers, and they are displayed on the My Journeys and Assigned Journeys tabs. • Personal journey templates of this category can't be created.

This table shows the different journey categories delivered in the application for reference. These journey categories don't drive any specific functionality.

Category	Usage
Absence	Predefined absence journey template that can be assigned to workers. For example, Oracle- Long Sick Leave.
Benefits	Predefined benefits journey template that can be assigned to workers. For example, Oracle- Benefits Enrollment.
Compensation	Predefined compensation journey template that can be assigned to workers. For example, Oracle- Employee Recognition Award.
Health and Safety	Predefined health and safety journey template that can be assigned to workers. For example, Oracle- Virus or Illness or Injury.
Learn	Predefined learn journey template that can be assigned to workers. For example, Oracle- Learning Record Activation.
Off Boarding	Predefined off boarding journey template that can be assigned to workers. For example, Oracle- Reduction in Force or Furlough.
On Boarding	Predefined on boarding journey template that can be assigned to workers. For example, Oracle- Relocation Journey.
Person	Predefined person journey template that can be assigned to workers. For example, Oracle- Just Married.
Recruiting	Predefined recruiting journey template that can be assigned to workers.
Talent Management	Predefined talent management journey template that can be assigned to workers. For example, Oracle- Succession Readiness.

Moving to Journeys

This table answers some common questions that you may have when you move to journeys:

Question	Answer
How do I enable journeys?	Enable journeys by setting the ORA_PER_JOURNEYS_ENABLED profile option to Y.
Do I need to reconfigure my existing templates to use Journeys?	No, you don't have to reconfigure your templates. Your existing templates are not impacted and will work in Journeys as is. Even though the user experience is new, the building blocks are the same. All assigned and in-progress journeys will be available on the Journeys page, if Journeys is enabled. Here are some points to consider: • Journey templates will continue to be configured the way you have been currently configuring them. • All existing journey template configurations will continue to be supported. For example, configurations related to tasks, notifications, notes, comments and attachments, messages, action and events, dashboard, and eligibility profiles. • All task types will continue to be available in Journeys. • Journey assignment will continue to function the same way that is, automatically based on an action or person event. • Journeys will continue to be available for pending workers as well. • There is no change to notification templates, reports, OTBI subject areas, audit capabilities, HDL, or HSDL.
What happens to existing assigned journeys when you enable Journeys?	All existing assigned journeys appear on the Journeys page with the same status.
Do I need to make any changes to the security roles I am using?	If you use predefined roles, no action is necessary. However, if you use custom versions of these roles, you need to add journeys related privileges to your custom roles. Add these privileges to your custom roles: • For the custom Employee role, add the ORA_PER_ACCESS_JOURNEY_BY_WORKER (Access Journey by Worker) privilege. • For the custom Line Manager role, add the ORA_PER_MANAGE_JOURNEY_BY_MANAGER (Manage Journey by Manager) privilege. • For the custom Human Resources Specialist role, add the ORA_PER_MANAGE_JOURNEY_BY_HR (Manage Journey by HR) privilege. See the Release 13 Oracle Human Capital Management Cloud Security Upgrade Guide on My Oracle Support (Document ID *2023523.1*) for instructions about implementing new functions in existing roles. For information about existing security privileges, refer to the *Security Reference for HCM* guide on Oracle Help Center.
What happens to changes that I made to user interface labels in existing pages?	You need to redo any label changes you made. For example, if you renamed Complete to End Task, you need to change it using the User Interface Text Editor. For more information, refer the Modify Text Using User Interface Text Tool topic in the User Interface Text chapter of the Configuring and Extending Applications guide.

Question	Answer
What happens to the personalizations I have done using page composer on responsive pages?	You need to redo the personalizations by using business rules in Visual Builder Studio (VB Studio). To extend your application by using VB Studio, see *Oracle Help Center* > your apps service area of interest > Books > Configuration and Extension. You need to set up VB Studio to extend Oracle cloud applications before you can start working with VB Studio. For more information see, *Set Up VB Studio to Extend Oracle Cloud Applications*.
What happens if I disable the profile option for Journeys?	When you disable Journeys, your assigned journeys are available in the Onboarding and Checklist Tasks apps.

3 Templates

Predefined Journey Templates

You can use any of the available predefined journey templates to assign to workers. Use the Checklist Templates page to search and modify predefined journey templates.

Template Name	Category
Oracle - Add a Child Journey	Onboarding
Oracle - Complete Your HCM Profile	Onboarding
Oracle – Benefits Enrollment	Benefits
Oracle - Employee Recognition Award	Compensation
Oracle - Employee Spot Bonus Award	Compensation
Oracle - Employee Work Anniversary	Compensation
Oracle - Incident Vehicle	Health and Safety
Oracle - Intra-Company Transfer Journey Assignment	Onboarding
Oracle - Journey to an International Assignment	Onboarding
Oracle - Journey to taking on an Additional Role	Onboarding
Oracle - Just Married	Person
Oracle - Learning Record Activation	Learn
Oracle - Long Non-Sick Leave	Absence
Oracle - Long Sick Leave	Absence
Oracle - Onboarding Journey	Enterprise Onboarding

Template Name	Category
Oracle - Onboarding Process	Enterprise Onboarding
Oracle - Off boarding Journey	Off boarding
Oracle - Parental Leave	Absence
Oracle - Performance Improvement Guidelines	Talent Management
Oracle - Promotion Journey	Onboarding
Oracle - Return from Leave	Onboarding
Oracle - Return to the Workplace	Enterprise Onboarding
Oracle - Reduction in Force or Furlough	Off boarding
Oracle - Relocation Journey	Onboarding
Oracle - Safe Travels	Onboarding
Oracle - Sick Leave	Absence
Oracle - Succession Readiness	Talent Management
Oracle - Virus or Illness or Injury	Health and Safety

How You Use Predefined Templates

You need to modify available predefined journey templates before you can use it. You use the Checklist Templates page to find a predefined journey template and make the changes you need.

1. On the Checklist Templates page, enable the **Draft** filter to search for predefined templates.
2. After you identify a template, duplicate it to create a copy.
3. Provide a unique name for your copy.
4. Optionally, you can make changes as required.
5. You must configure either an action or an event to trigger the journey automatically. You can manually assign the journey otherwise.
6. Save your changes.
7. Activate the template by changing the status from **Draft** to **Active**. The journey template is ready for use.

Journey Template Definition

For more information, refer to this topic: *What are the attributes that define a journey template?*

Journey Allocation Criteria

You can set the criterion while assigning journeys.

Here's how the criteria impacts assigning of journeys:

The journey is assigned if it meets the specified criteria. Select one of these criterion to determine when the journey will be assigned:

- Allocated manually, or when the record is created or approved: The journey can be assigned manually or based on the action. For example, if a transfer action record is created on 16-Sep-2023 and the transfer is effective on 19-Sep-2023, it will be assigned on 16-Sep-2023 which is the date on which the record was created.
- When the checklist action record becomes effective: The value entered in the **Days for Initiation** field will determine the number of days before or after which the action occurs to assign the journey. The journey is assigned based on the action. For example, if a transfer action record is created on 16-Sep-2023 and effective on 19-Sep-2023, it will be assigned on 19-Sep-2023 which is the date on which the action record is effective. If you enter 2 in the **Days for Initiation** field, it will be assigned on 21-Sep-2023 which is 2 days after the effective date. If you enter -1 in the **Days for Initiation** field, it will be assigned on 18-Sep-2023 which is 1 day before the effective date.

Here are some points to consider:

- A journey is automatically triggered only if the HRC_DISABLE_HCM_EVENTS_PROCESSING profile option is set to N.
- If you configured the allocation criteria as **When the checklist action record becomes effective** and **Days for Initiation** as 1, the journey is assigned at 00:00 system time (when the next day starts) once the allocation criteria is met.
- Consider this scenario. You configured the allocation criteria differently in multiple enterprise step journeys within the same enterprise onboarding journey. In this case, if you configure the allocation criteria for any enterprise step journey as **Allocated manually, or when the record is created or approved**, then the journey will be assigned as per this criterion.

Journey Completion Criteria

You can set the criterion for completing journeys.

Here's how the criteria impacts completion of journeys:

The journey is marked completed automatically if it meets the specified criteria. Select a criterion to determine when the journey will be marked complete:

- All mandatory tasks completed: When all mandatory tasks in the journey are completed, the journey status is set to completed.
- All mandatory and optional tasks completed: When all mandatory and optional tasks are completed, the journey status is set to completed.
- All mandatory tasks done, offset elapsed for optional tasks: The journey is completed only when all mandatory tasks are completed. If there are incomplete optional tasks, the journey is completed based on the offset period.

Here are some points to consider:

- A journey doesn't expire or time out. However, an individual task within a journey expires or times out.
- A journey is automatically completed when it's tasks are completed or expired.
- A journey can't be manually marked as complete. However, you can use the Force Complete option to forcefully mark the journey as complete. For example, you may mark an onboarding journey as force completed because the employee didn't join the organization.
- When a task expires, the task status is set to **EXP**.
- When a task in a journey is marked as Done or Approved, the task status is set to **COM**. Alternatively, if the task is marked as Not Applicable or Rejected, the task status is set to **REJ**.

Actions Supported in Journeys

Here's some recommended journey categories to use for common employment and recruiting actions.

Action	Category to use	Scenarios where this is applicable
Hire (HIRE) Add Contingent Worker (ADD_CWK)	Onboarding	Adding a new hire.
Add Pending Worker (ADD_PEN_WKR)	Onboarding	Adding external candidates (through any source). If you use Oracle Recruiting Cloud, when a new hire candidate is progressed to the HR phase, both the actions, Move to HR and Add Pending Worker, are triggered in case of a new hire. Hence, it's recommended that you don't configure a journey based on the Move to HR action for new hire candidates. Instead, configure journeys for new hire candidates based on the action of Add Pending Worker. This configuration is also helpful in case the candidate gets delayed in the state Error During Processing after they're moved to the HR phase. The journey will be assigned only after the issue gets resolved when the Pending Worker or Work Relationship can be created.

Action	Category to use	Scenarios where this is applicable
Add Pending Work Relationship (ORA_ADD_PWK_WORK_RELATION)	Onboarding	Rehires who already have a terminated work relationship in the application. If you use Oracle Recruiting Cloud, when a rehire candidate is progressed to the HR phase, both the actions, Move to HR and Add Pending Work Relationship, are triggered in case of a rehire. Hence, it's recommended that you don't configure a journey based on the Move to HR action for rehire candidates. Instead configure journeys for rehire candidates based on the action of Add Pending Work Relationship. This configuration is also helpful in case the candidate gets delayed in the state Error During Processing after they're moved to the HR phase. The journey will be assigned only after the issue gets resolved when the Pending Worker or Work Relationship can be created.
Global Transfer (GLB_TRANSFER), Global Temporary Assignment (GLB_TEMP_ASG)	Onboarding	Movement of existing workers. If you use Oracle Recruiting Cloud, when an internal candidate gets moved into the HR phase, they arrive in the status HR - Pending Manual Processing and they wait for an HR specialist to process them in the Manage Job Offers work area. The HR specialist will transform the offer's values into the action that was originally selected in the offer, such as global transfer and global temporary assignment. If any journey is configured with these actions, it will get assigned for the internal person only after the HR specialist has submitted this process based upon the offer. If you need your internal candidate to perform journey tasks before their actual internal change becomes effective, then you would need to configure the journey for the action of Move to HR.
Termination (TERMINATION), Resignation (RESIGNATION)	Offboarding	Exit of workers.
Move to HR (ORA_IRC_ACCEPT_JOB_OFFER)	Any applicable category	This action is applicable only if you use Oracle Recruiting Cloud. Although the code for the action Move to HR is ORA_IRC_ACCEPT_JOB_OFFER, this action isn't triggered when the candidate accepts the job offer. After an offer is accepted and before the Move to HR UI action, time may elapse and any custom-configured phases can intervene. So despite it's code which mentions acceptance, this action named Move to HR is triggered when the candidate's job application changes to another state in the HR phase.
Create Offer (EMPL_OFFER_CREATE)	Any applicable category	This action is applicable only if you use Oracle Recruiting Cloud. This isn't a recommended option, as there are many reasons that a newly-

Action	Category to use	Scenarios where this is applicable
		drafted offer may not result in a newly-hired or newly-transferred worker. Assigning a journey too early in a candidate's lifecycle isn't effective. External candidates can't access any journeys assigned to them until after they become a pending worker. Internal mobility candidates may or may not end up accepting the offer as the recruiting process continues. So an appropriate time in the recruiting lifecycle to assign a journey is near the end, when the candidate's job application moves into the HR phase. Journey tasks are assigned to a line manager or area of responsibility only if the journey is being assigned to an employee, contingent worker, nonworker, and pending worker, and not to a candidate having an offer. For more information about journey assignment during the recruitment phase, see the Implementing Recruiting guide on Oracle Help Center.
Change Offer (EMPL_OFFER_CHANGE)	Not applicable	This action isn't used by any product.

Considerations for Configuring Actions in Journeys

You can specify the action based on which you want to assign a journey either on the General tab or the Actions and Events tab during journey setup.

Remember that any action you configure in the Actions and Events tab is effective only if there isn't any action configured in the General tab.

These journey categories don't support action and action reasons:

- Contextual Journey
- Gatekeeper Law
- Guided Journey
- Survey

Before you configure the action, here are some points for you to consider.

Where you configure the action	Journey category this applies to	What you can do
General tab	• All categories	• You can include one action in the journey but can't include an action reason.
Actions and Events tab	• All except Enterprise Onboarding and Enterprise Onboarding Step	• You can include multiple actions for a single journey.

Where you configure the action	Journey category this applies to	What you can do
		• Journeys can be assigned for specific action reasons within the selected action.

Here are some points to consider:

- These actions won't automatically start a journey, even though they appear in the Action Name list of values when configuring a journey template.
  - Add Non-Worker
  - Change Offer
  - Contract Extension and Update when performed from the responsive Employment Contracts page
  - Create Offer
  - Position Synchronization Configuration Change
  - Synchronization from Position Tree
  - Update Assignment EFF
- If you have approvals enabled for any of the actions and a journey is configured to start for an action, for example, transfer, then the journey will start only after that transaction (transfer) is completed and committed to the database.

How You Configure Events in Journeys

Events track legislative or personal attribute changes in a worker's person record. For example, workers' updates to their last name, contact information, ethnicity or disability. You can configure events on the Actions and Events tab during journey setup.

Here are some points to consider:

- You can configure events in journeys of any category, other than Enterprise Onboarding Step and Enterprise Onboarding.
- You need to configure the Processing Mode as Alerts based processing in the Message tab.

How to Configure Person Events

Define one or more person related events to include in your journey by selecting a predefined attribute and specifying the existing value and new value. All events names that start with Person are considered as person events in the context of journey templates. When a worker makes updates that match the ones that you have defined, it causes the event to start the journey. These are the attribute values you can specify when defining an event in a journey. By default, the configuration is active.

Event Attribute Values	What it Means
Any value	Noneditable, considers the existing value in the person record.
No value	Noneditable, indicates that a value isn't present in the person record.

Event Attribute Values	What it Means
Specific value	Indicates a specific value for the event. For example, Marital Status = Married

How You Configure Other Events in Journeys

You can configure events in your journeys by selecting predefined attributes and creating a condition which when met triggers a journey automatically.

You use Condition Builder to configure conditions that include specific attributes. If you need to include more than one condition, you create condition groups comprising expressions. Then you connect the expression groups using an OR or AND connector.

For more information about the event related attributes that you can configure in your expression, see this topic: *What are the event attributes that you can configure to trigger journeys automatically?*

Example of Configuring Conditions in Journeys Based on Absence Attributes

This example demonstrates how to use the condition builder to configure an absence event that triggers a journey when an employee submits an absence request. You create one expression to check for absence type and another for absence status and connect these two expressions.

Expression for Absence Type

1. In Setup and Maintenance, go to the Checklist Templates task.
2. Enter details for the journey.
3. Click the Actions and Events tab.
4. In the Configure Events section, click **Add** and select Absence Entries in the **Name** list of values.
5. Click Edit Condition to display the Condition Builder and click **Create Group**.
6. Specify values as indicated in this table. Where no value is indicated, use the default.

Field	Value
Attribute	Absence Type
Operator	Equals
Ignore Case	Leave as is

Field	Value
Operand Type	Constant
Operand Value	Maternity Leave

7. Click **OK**.

Expression for Absence Status

1. To join the first condition to the second group, click **Create Group** again.
2. Select And in the Expression Connector drop-down list.
3. Specify values as indicated in this table. Where no value is indicated, use the default.

Field	Value
Attribute	Absence Status
Operator	Equals
Ignore Case	Leave as is
Operand Type	Constant
Operand Value	Submitted

4. Click **OK**.
5. Click **Save**.

Configure Criteria for Journeys and Tasks Using Redwood Rule Builder

You can use the Redwood Rule Builder in the Redwood journeys setup pages to configure various criteria for journeys and tasks.

You can use the Rule Builder when you do these activities:

- Configure events in a journey template.
- Create a contextual journey template.
- Create a survey journey template.
- Configure an application task that supports completion criteria.

- Configure an embedded application task that supports completion criteria.

These are some use cases on how you can use the Rule Builder:

Configure Rule to Trigger Journey Based on Event

You can configure the rule to automatically trigger a journey when an employee submits a maternity leave request. To do this, follow these steps:

1. Navigate to the journey where you want to configure the event. On the Advanced tab, click **Add** in the Configure Events section.
2. Select the **Absence Entries** event.
3. In the Rule Builder panel drawer, add two groups and configure these conditions in each group by using the attribute, operator, and operand value:
    a. Absence Type is Maternity Leave
    b. Absence Status is Submitted

    Connect these two groups by using the group connector (**All** operator). The rule is evaluated only when both these conditions are satisfied.

Configure Rule to Trigger Contextual Journey

You can configure the rule to automatically trigger a contextual journey when a user initiates a transfer for a worker in US_ATL location or Direct Sales US department. To do this, follow these steps:

1. Navigate to the journey where you want to configure the rule. On the Advanced tab, click **Add** in the Configure Criteria section.
2. Create a group and add these conditions in the group:
    a. Location is US_ATL
    b. Department is Direct Sales US

    Connect these two conditions by using the expression connector (**Any** operator). The rule is evaluated only when either of these conditions is satisfied.

Configure Rule to Evaluate Population for Survey Journey

You can configure the rule to select workers in the Vision Corporation legal employer and Vision ADB business unit. To do this, follow these steps:

1. Navigate to the journey where you want to configure the rule. On the Advanced tab, click **Add** in the Configure Criteria section.
2. Create a group and add this condition in the group:
    a. Legal Employer is Vision Corporation
3. Add a subgroup in the created group and add this condition in the subgroup:
    a. Business Unit is Vision ADB

    Connect the group and its subgroup by using the group connector (**All** operator). The rule is evaluated only when both these conditions are satisfied.

Configure Rule to Determine Application Task Completion

You can configure the completion criteria to validate that users in the Vision Corporation legal employer have provided a home address before marking their journey task as complete. To do this, follow these steps:

1. Navigate to the journey where you want to configure the rule. On the Overview tab > Tasks section, click the Edit icon for the application task where you want to configure the completion criteria. Click **Add** in the Completion Criteria section.
2. Select the Address business object attribute and the criteria you want to configure for the application task.
3. Create a group for the person criterion and add this condition in the group: Legal Employer is Vision Corporation.
4. Create a group for the object criterion and add this condition in the group: Address Type is Home Address. Connect the groups in both criteria by using the group connector (**All** operator). The rule is evaluated only when both the conditions are satisfied.

Points to Consider

- You can add only one subgroup in a group when using Redwood Rule Builder.
- You need to ensure that the case of the attribute value configured in the rule matches that of the data in the application.

Example of Creating an Onboarding Journey

This example shows how to configure two onboarding journeys with onboarding tasks that new hires need to complete on their first day and within the first week.

In this example, you create two journeys, one that includes tasks to be done on the first day and the second to include tasks to be done in the first week. The journey is applicable for new hires located in the USA. You use the Checklist Templates task to create and manage journeys.

Summary of Tasks

To create the journeys, you need to:

1. Enter general details
2. Create tasks
3. Add a welcome message with instructions
4. Configure the content types for the dashboard

Before You Start

1. Create an eligibility profile Work_Location_US for workers in the USA.

Entering General Details

1. In the Setup and Maintenance work area, go to the following:
    - Functional Area: Workforce Information

- Task: Checklist Templates

2. On the Checklist Templates page, click **Create** to open the Create Checklists page.
3. Create two separate journeys with values as detailed below:

Fields	Journey 1	Journey 2
Name	Onboarding - On Your First Day	Onboarding - Your First Week
Description	This journey includes tasks to be completed on the first day.	This journey includes tasks to be completed within the first week.
Category	Onboarding	Onboarding
Status	Active	Active
Date From	1-Sep-2023	1-Sep-2023
Date To	10-Sep-2026	10-Sep-2026
Country	All Countries	All Countries
Eligibility Profile	Work_Location_US	Work_Location_US
Action Name	Hire	Hire
Allocation Criteria	When the action record becomes effective	When the action record becomes effective
Days for Initiation	0	3
Completion Criteria	When all mandatory tasks are completed	When all mandatory tasks are completed

4. Click **Save**.

Creating Tasks

1. Click the **Tasks** tab, and then click **Create**.
2. Complete the fields, as shown in the table for each of the two high level steps. The tasks must be associated to the respective Onboarding journeys created as prerequisites.

3. Create the tasks that need to be included in each of the journeys as shown in the table:

Field	Values for task included in Onboarding - On Your First Day	Values for task included in Onboarding - Your First Week
Task Names	Request Access Badge	Verify Your Personal Information
Description	Optional	Optional
Status	Active	Active
Country	All Countries	All Countries
Eligibility Profile	Leave blank	Leave blank
Preceding Task	Leave blank	Leave blank
Mandatory	Yes	Yes
Target Duration	3 Days	1 Day
Expire	5 Days After due date	8 Days After assigned date
Performer	Worker	Worker
Owner	Area of Responsibility HR Representative	Line Manager
Action Type	Manual	Application Task Select the relevant application task from the list of values.
Notes	Complete this task before the end of your first day.	Don't forget to update your details before the end of your first week.

4. Similarly, create one more task titled Provide Identity Proofs to include in Onboarding - On Your First Day and two more tasks titled Meet Your Team and Review Campus Map Directions to include in Onboarding - Your First Week.
5. Click **Save and Close**.

Adding a Message

1. Click the Message tab and enter the title and message shown in the table:

Field	Value for Onboarding - On Your First Day	Value for Onboarding - Your First Week
Title	Welcome	Hope you're enjoying it here.
Text	As a new employee, you're required to complete all onboarding tasks.	All tasks need to be completed by their due date.

2. Click **Add** and specify details of the journey sponsor for workers to contact during the onboarding process.
3. Click **Save**.

Configuring the Content Types for the Dashboard

1. In the Notes section, click **Add** and complete the fields as shown in the table:

Field	Value for Onboarding - On Your First Day	Value for Onboarding - Your First Week
Content Title	Orientation	Join a club.
Description	Check your email for the schedule.	Visit our home page for details.
Content Status	Active	Active
Content Type	Standard Note	Standard Note

2. In the What's Happening section, click Add and complete the fields as shown in the table:

Field	Value for Onboarding - On Your First Day	Value for Onboarding - Your First Week
Category	Insight	Announcement
Content Title	Company Information	Goal Setting
Status	Active	Active
Content URL	https://www.oracle.com/index.html	https://www.oracle.com/index.html
Event Date	Leave blank	Leave blank
Image URL	Leave blank	Leave blank

3. Click **OK**.
4. Click **Save**.

Considerations When Using Enterprise Onboarding Journey Category

For the points to consider when you use the Enterprise Onboarding journey category, refer to this topic: *What are the considerations for using Enterprise Onboarding journey category?*

Considerations for Importing a Journey Template Configuration

This topic describes the considerations to import a journey template on the Checklist Template setup page.

You can use the Export button on the setup page to quickly export the journey template to either review offline in Microsoft Excel, or attach to the service request (SR) for Support and Development to review.

Similarly, you can use the Import button on the setup page for a one-off import of the journey template. For example, for a Customer Connect sharing initiative. This button is hidden by default and enabled using a profile option.

Here are some points you need to consider when importing a journey template xml:

What are you importing?	What you need to do before importing
Enterprise Onboarding journey category	First import the step journeys (journeys of the category **Enterprise Onboarding Step**) in the destination environment with the same names as in the XML file.
Journey that has an eligibility profile associated to it	Ensure that the eligibility profiles are available in the destination environment with the exact same names.
Journey that has tasks of the type Electronic Signature – Native	Configure the document to be signed in the destination environment with the exact same name and residing in the same path as in the XML file.
Journey that has tasks of the type Electronic Signature – DocuSign	Configure the DocuSign integration in the destination environment with the exact same name as in the XML file.
Journey that has tasks of the type Questionnaire	Configure the questionnaires with the exact same codes in the destination environment.
Journey that has tasks of the type Document	Attach the document again to the task in the destination environment because the documents associated with the task won't be imported into the destination environment.
Journey that has tasks of the type Report	Configure the report in the destination environment with the same name and residing in the same path as in the XML file.
Journey that has tasks of the type I-9 configuration	Configure the I-9 codes in the destination environment with the same names as in the XML file.

What are you importing?	What you need to do before importing
Journey that has tasks of the type Configurable Form	Configure the Descriptive Flexfield (DFF) Context in the destination environment with the same context name as in the XML file. You can then create the segments for the context after importing.
Journeys that have been translated to more than one language.	Translations won't be imported.

It's recommended not to use Export or Import when migrating your configuration across different environments. To migrate your configuration across environments, use the Functional Setup Manager (FSM) feature. To see the documentation about the feature, go to Oracle Help Center > Human Resources > Implement > Using Functional Setup Manager > Setup Data Export and Import

4 Assigning Journeys and Tasks

Journey Actors

This table describes the actors involved in a journey:

Actor	Description
Assignee	A person to whom the journey is assigned.
Assignee's Line Manager	If a worker has more than one concurrent active assignment and if the task performer or owner is a Line Manager, then the journey task is always assigned to the line manager of the primary assignment of the worker. Therefore, the journey notification is also always sent to the line manager of the primary assignment of the worker.
Assignee's Areas of Responsibility (AoR)	If a worker has more than one concurrent active assignment and if the task performer or owner is the AoR, then the journey task is always assigned to the AoRs of the primary assignment of the worker. Therefore, the journey notification is also always sent to the AoR of the primary assignment of the worker. If you are a task performer or owner, you don't have to enable the Include in Work Contacts option, unless the representative is truly a contact. However, when configuring the AoR, you must specify the Usage option as Checklist for the representative to appear in the Journeys task. During journey assignment, the individuals with the selected responsibilities are identified and designated as task performers or owners, regardless of the work contact's flag. If offset days are configured for a task and if there are multiple concurrent active assignments, the performer or owner will always be the Line Manager or AoR of the primary assignment of the worker.
Task Performer	Task performer is the person who carries out the task. You can select one of these performers: • Worker: The journey assignee. • Line Manager: The line manager of the worker's primary assignment as of the reference evaluation date. This date is the task assignment date or the date that's derived after applying the offset days. • Areas of Responsibility (AoR):The person or group of persons who have a specific responsibility for the worker's primary assignment as of the reference evaluation date. This date is the task assignment date or the date derived after applying the offset days. The performer name displays the responsibility type name and not the name of the persons who have that area of responsibility. Let's say the worker and the performer derived based on AoR end up being the same person, and a journey task is assigned to the performer. Then, the task doesn't display in the Others Task section. • Initiator: The person who initiated the transaction which triggered the journey or the person who manually assigned the journey. • Specific user: The user who may or may not have a person record in the application. If this user is terminated, you need to manually assign all journey tasks to another active user. If the user

Actor	Description
	doesn't have a person record associated with their user account, they can't be configured as the task performer on Redwood Journeys Template pages. If you don't have access to a worker, but are a performer for the worker's task, you can see the task and its details in your My Tasks tab in Journeys. You can expand and view the details of the task. You can also access the task using the URL in the task notification page. If you assign a task to multiple performers (AoR), the task is visible for all the performers and any one of them can act on it. When an AoR is configured as a task performer and the AoR contains multiple members, action buttons aren't available in the email and bell notifications. Additionally, if the task is marked done or not applicable by an AoR, then the name of the responsibility type is displayed and not the name of the person who completed the task. Only performers can download the task .ics files to add to their calendar. The downloaded .ics file can be imported to most commonly used calendar applications. The .ics file includes a link to the task and takes the performer directly to the task page. You can’t modify the .ics file contents.
Task Owner	A task owner plays these roles: • Acts as the main contact for a task. The task owner's information displays in the Contact Info section of the assigned task. • Receives notifications when a task is assigned, reassigned, completed, updated, or deleted (you need to enable the notification setting for task owner in the Notifications and Reminders tab when configuring a task). • Acts as the fall back task performer if the performer to whom the task is assigned isn't valid (if the performer of the task is the line manager or AoR who isn't available for the worker). You can select one of these as the task owner: • Line Manager: The line manager of the worker's primary assignment as of the reference evaluation date. This date is the task assignment date or the date derived after applying the offset days. • Areas of Responsibility (AoR): The person or group of persons who have a specific responsibility for the worker's primary assignment as of the reference evaluation date. This date is the task assignment date or the date derived after applying the offset days. The performer name displays the responsibility type name and not the name of the person who has that area of responsibility. • Initiator: The person who initiated the original transaction which triggered the journey or the person who manually assigned the journey. • Specific user: The user who may or may not have a person record in the application. If this user is terminated, you need to manually assign all journey tasks to another active user. If the user doesn't have a person record associated with their user account, they can't be configured as the task owner on Redwood Journeys Template pages. Here are a few points to consider: • In order for a task owner to be able to view or perform the task, you need to grant them the Access Journey by Worker duty role if you're using Journeys. • A task owner can't access a person's assigned journeys without the appropriate person security profile. • When you use HCM Data Loader or REST API to assign a journey through a user who doesn't have a person record, then nothing is shown in the Contacts Info section of the task if the task

Actor	Description
	owner is an initiator. When such a task is assigned to new hires, the Contacts Info section appears blank.
Initiator	An initiator is the person or user who performed the transaction that triggered the journey automatically or who manually assigned the journey. When a task is assigned, the application evaluates if it can be assigned to the task performer. If the performer can't be determined, then the application evaluates if it can be assigned to the task owner, and if the task owner can't be determined, the application assigns the task to the task initiator. For example, you have journey task whose performer is the Line Manager. When the journey gets assigned and the Line Manager isn't available for the worker, then the application checks who is the task owner at the task setup level. If you had set up the task owner as the AoR and the AoR also isn't available, then the journey task is assigned to the initiator who actually performed the specific transaction.
Contact	The contact person for a journey. This actor can be configured as the Assignee Line Manager, Assignee AoR, Specific User, or a Free Form Text. You can have only one contact for each journey. This actor isn't available for the Contextual, Guided, and Survey journey categories.

How Journeys are Assigned

For the different methods a journey and task can be assigned, refer to this topic: *How are journeys assigned?*

How You Schedule Recurring Journeys

For more information, refer to this topic: *How do I schedule recurring journeys?*

Attributes that Determine Journey or Task Assignment

For more information, refer to this topic: *What attributes determine journey or task assignment?*

How Task Performers and Task Owners are Determined in Journeys

The date when the action becomes effective for certain journey actions is predetermined. For more information, refer to this topic: *How are task performers and task owners determined in journeys?*

Examples of Task Delay Duration in Journeys

You can delay the start of a task by specifying the number of days after which the task should be assigned to a task performer.

The delay duration along with other journey assignment criteria you specify will determine when the task is assigned to a task performer.

If you specify delay duration for a task that has a preceding task, then the delay duration is calculated from the day on which the preceding task is marked as complete. For example, you set Task A as the preceding task for Task B and Task B has a delay duration of 2 days. If Task A is completed on 19th September, Task B will be assigned and initiated on 21st September. Also, Task B will be disabled and can't be acted upon until it's initiated.

In these examples let's see how the task assignment date changes based on the journey allocation criteria and the delay duration.

Example 1

Assign a journey task to a task performer 2 days after the new hire record is created.

Allocation Criteria	Date
Create a new hire record	10-Sep-2023
New hire's Start Date	9-Sep-2023
Create a journey template with action **Hire** and set journey allocation criteria to **Checklist manually allocated or record created and approved**	
Create a task Verify Personal Information with performer as Worker	
Specify Delay Duration	2 days
Journey task is assigned and task notification sent (10-Sep-2023 plus 2 days)	12-Sep-2023

Allocation Criteria	Date

Example 2

Assign a journey task to a task performer 2 days after the new hire record becomes effective.

Allocation Criteria	Date
Create a new hire record	10-Sep-2023
New hire's Start Date	9-Sep-2023
Create a journey template with action Hire and set journey allocation criteria to **When the action record becomes effective** and Days for Initiation as 4	
Create a task Verify Personal Information with performer as Worker	
Specify Delay Duration	2 days
Journey task is assigned and task notification sent (10-Sep-2023 plus 4 days plus 2 days)	16-Sep-2023

Example 3

Assign a journey task to a task performer 5 days after a pending worker record is created.

Allocation Criteria	Date
Create a pending worker record	24-Aug-2023
Pending worker's proposed start date	3-Sep-2023
Create a journey template with action Add Pending Worker and set journey allocation criteria to **Checklist manually allocated or record created and approved**	
Create a task Submit Identity Proofs with performer as Worker	
Specify Delay Duration	5 days

Allocation Criteria	Date
Journey task is assigned and task notification sent (24-Aug-2023 plus 5 days)	29-Aug-2023

Example 4

Assign a journey task to a task performer 5 days after a pending worker record is effective.

Allocation Criteria	Date
Create a pending worker record	24-Aug-2023
Pending worker's proposed start date	3-Sep-2023
Create a journey template with action Add Pending Worker and set journey allocation criteria to **When the action record becomes effective** and Days for Initiation as -2	
Create a task Submit Identity Proofs with performer as Worker	
Specify Delay Duration	5 days
Journey task is assigned and task notification sent (3-Sep-2023 minus 2 days plus 5 days)	6-Sep-2023

5 Guided Journeys

Overview of Guided Journeys

For more information, refer to this topic: *What are guided journeys?*

Supported Task Types in Guided Journeys

For more information, refer to this topic: *What are the supported task types in guided journeys?*

Allow External Users to Access Guided Journeys

You can enable external users to access guided journeys on Redwood pages by enabling the option when you create a new journey.

Consider these use cases:

- An anonymous user or a user who doesn't have a user account in the system can access these flows of the Procurement product:
  - External Supplier Registration: A new supplier is registering for the first time with your organization. For example, a salesperson from Vision Technologies registers with your organization to supply laptops. As part of the registration process, you can provide guidance to the external salesperson using Guided Journeys.
  - Negotiation Abstracts: The negotiation summaries, such as RFQs and Auctions are uploaded on your organization's website for potential suppliers to assess for future business. As part of the process, you can provide guidance to the external suppliers interested in doing business with you using Guided Journeys.
- You can share the supplier code of conduct and company policies with suppliers that you conduct business with. These are large documents that the suppliers need to review. You can share guidance and documents with external suppliers using Guided Journeys.
- You can provide detailed instructions to suppliers. These instructions can be about what to do or not to do for specific transactions or task flows. You can also share FAQ documents with suppliers to minimize support cost. The Supplier Portal has many different task flows that span across purchasing, invoicing, receiving, and so on. Each flow can have its own documents loaded to help answer questions from suppliers.

Points to Consider

- The default option to classify the guided journey will be Internal, and such guided journeys tasks will be rendered only for internal users with a person record.
- If you want the guided journeys tasks to be made available to anonymous or supplier users, then mark the guided journey as External.

- Only these task types are supported for External guided journeys:
  - Manual Task
  - External URL
  - Video

Enable a Guided Journey for Responsive Pages

You're configuring a guided journey that will display to Meg who is a line manager in Vision Corp, Redwood Shores when she's promoting Elizabeth, her direct report.

The guided journey is intended to provide guidance to Meg through the promotion process by providing details on what needs to be done at the page level and in each section of the promotion process.

Before You Start

- Set the ORA_PER_GUIDED_JOURNEYS_ENABLED and ORA_PER_GUIDED_JOURNEYS_SETUP_REDWOOD_ENABLED profile options to Y.
- Create tasks relevant for the journey such as, watch the view on how to enter promotion details, upload recommendations for promotion, answer the promotion justification questionnaire, review of assignment information, and view report on promotions in previous years.
- Since the guided journey is specific to a particular action, you need to use the Transaction Design Studio (TDS) to associate it with an action using TDS rules. You use specific attributes available for a TDS action to further determine for whom the guided should display.
- You select and add tasks that you want to display at the page header or section header region.

Configure a Guided Journey for Promotion Page

1. On the application home page, click the **My Client Groups** tab.
2. Click **Show More** after the list of quick actions.
3. Click the **Guided Journey** quick action in the **Journeys Setup** area.
4. Click **Create** and enter details for the creation method you selected in the New Journey panel drawer.
5. Click **Create Draft**.
6. In the **Tasks** section of the **Overview** tab, create the necessary tasks that need to be part of the promotion guided journey.
7. Preview the journey and activate the journey template.

Configure Rule for Promotion in Transaction Design Studio

1. On the **My Client Groups** tab, click **HCM Experience Design Studio** under Quick Actions.
2. Configure a sandbox for HCM Experience Design Studio.
3. Enter the sandbox and select **HCM Experience Design Studio** from the **Tools** menu.
4. Click the **Transaction Design Studio** tab.
5. Select the **Promote** action from the **Action** list of values (LoV) and click **Add**.
6. Enter the basic details.

7. Click the **Edit** (pencil) icon for Page-level guided journey configuration.
8. Select the guided journey you created for promotion. From the list of tasks, select those that you want to display at the page level when a user performs a Promote action.
9. Click **Done**.
10. Click the **Edit** (pencil) icon for the section where you want the guided journey tasks to display.
11. Select the guided journey you created for promotion. From the list of tasks, select those that you want to display at the section level when a user performs a Promote action.
12. Click **Done**.
13. Click **Save and Close**, and then click **Done**.
14. Publish the sandbox after testing your configuration.

When Meg initiates the Promote action for Elizabeth, she navigates to a page where she can view the **Guide Me** button both at the page and section levels to view tasks in the guided journey. She can click the task name and view the task details that appear in the dialog window.

Enable a Guided Journey for Redwood Pages

You're configuring a guided journey that will display to Ryan who is a HCM implementer in Vision Corp, Redwood Shores when he's creating a department using the Department Redwood page.

The guided journey is intended to provide guidance to Ryan through the department creation process by providing details on what needs to be done at the page level and in each section of the department creation process.

Before You Start

- Set the ORA_PER_GUIDED_JOURNEYS_ENABLED and ORA_PER_GUIDED_JOURNEYS_SETUP_REDWOOD_ENABLED profile options to Y.
- Create tasks relevant for the journey such as, watch this video to add a new department, review the department naming convention guidelines, and review the functions of departments.
- Since the guided journey is specific to a particular Redwood page, you need to enable the guided journey for the page by using Visual Builder (VB) Studio.
- You configure properties for the tasks that you want to display at the page level or section level in the Redwood page.

Configure a Guided Journey for Add Department Page

1. On the application home page, click the **My Client Groups** tab.
2. Click **Show More** after the list of quick actions.
3. Click the **Guided Journey** quick action in the **Journeys Setup** area.
4. Click **Create** and enter details for the creation method you selected in the New Journey panel drawer.

   Make note of the guided journey code. This code needs to be entered for the page properties in VB Studio.
5. Click **Create Draft**.
6. In the **Tasks** section of the **Overview** tab, create the necessary tasks that need to be part of the department creation guided journey.

   Make note of the task codes. These codes need to be entered for the page properties in VB Studio.

7. Preview the journey and activate the journey template.

Enable Guided Journey for Add Department Page in Visual Builder Studio

1. On the application home page, click the **My Client Groups** tab.
2. Click **Show More** after the list of quick actions.
3. Click the **Departments** quick action in the Workforce Structures area.
4. Click **Add Department**. The New Department page is displayed.
5. From the Settings and Actions menu in the global header area, click **Edit Page in Visual Builder Studio**. Ensure the user has appropriate access to the VB Studio configuration to see the VB Studio option.
6. Select the project from the list and then click **Select**. Note that in case you're accessing VB Studio for the first time, you must create a project.
7. Select **Express** mode in VB Studio.
8. To enable the guided journey, configure these page properties:
   a. Set Guided Journeys Code at the page level: This property controls the display of the guided journey at the page level. Set it with the journey code you noted in step 4 under Create a Guided Journey for Add Department Redwood Page.
   b. Set Guided Journeys Task Codes at the page level: This property controls the display of guided journey tasks at the page level. Set it with the task codes you noted when creating the page level guided journey tasks. Use the + icon to add more rows to display multiple tasks.

      If you want to show all tasks of the guided journey, leave the page guided journey task codes blank.
   c. Set Guided Journeys Code at the Section Level: This property controls the display of the guided journey in the <section name> section where <section name> is the name of the section in the page where you want to enable the guided journey. Set it with the journey code you noted in step 4 under Create a Guided Journey for Add Department Redwood Page.
   d. Set Guided Journeys Task Codes at the Section Level: This property controls the display of guided journey tasks in the <section name> section where <section name> is the name of the section in the page where you want to enable the guided journey. Set it with the task codes you noted when creating the section level guided journey tasks. Use the + icon to add more rows to display multiple tasks.

      If you want to show all tasks of the guided journey, leave the detail section guided journey task codes blank.
9. Click **Preview** in VB Studio to view the guided journey details.

Enable a Guided Journey for Explore Tab in Journeys

You're configuring a guided journey that will display to Carla who is a line manager in Vision Corp, Redwood Shores when she's learning how to use Journeys.

The guided journey is intended to provide guidance to Carla through the journey learning process by providing details on what can be done in the Explore tab of Journeys.

Before You Start

- Set the ORA_PER_GUIDED_JOURNEYS_ENABLED and ORA_PER_GUIDED_JOURNEYS_SETUP_REDWOOD_ENABLED profile options to Y.

- Create guided journey tasks relevant for the journey such as, overview of journey tabs and how you assign journeys from the Explore tab.
- Since the guided journey is specific to a particular Redwood page, you need to enable the guided journey for the page by using Visual Builder (VB) Studio.
- You configure properties for the tasks that you want to display at the page level or section level in the Redwood page.

Configure a Guided Journey for Explore Tab of Journeys

1. On the application home page, click the **My Client Groups** tab.
2. Click **Show More** after the list of quick actions.
3. Click the **Guided Journey** quick action in the Journeys Setup area.
4. Click **Create** and enter details for the creation method you selected in the New Journey panel drawer.

   Make note of the guided journey code. This code needs to be entered for the page properties in VB Studio.
5. Click **Create Draft**.
6. In the **Tasks** section of the **Overview** tab, create the necessary tasks that need to be part of the guided journey.

   Make note of the task codes. These codes need to be entered for the page properties in VB Studio.
7. Preview the journey and activate the journey template.

Enable Guided Journey for Explore Tab of Journeys in Visual Builder Studio

1. On the application home page, click the **My Client Groups** tab.
2. Click the **Journeys** app.
3. Click the **Explore** tab.
4. From the Settings and Actions menu in the global header area, click **Edit Page in Visual Builder Studio**. Ensure the user has appropriate access to the VB Studio configuration to see the VB Studio option.
5. Select the project from the list and then click **Select**. Note that in case you're accessing VB Studio for the first time, you must create a project.
6. Select **Express** mode in VB Studio.
7. To enable the guided journey, configure these page properties:
   a. Set Guided Journeys Code at the page level: This property controls the display of the guided journey at the page level. Set it with the journey code you noted in step 4 under Configure a Guided Journey for Explore Tab in Journeys.
   b. Set Guided Journeys Task Codes at the page level: This property controls the display of guided journey tasks at the page level. Set it with the task codes you noted in step 6 when creating the page level guided journey tasks. Use the + icon to add more rows to display multiple tasks.

      If you want to show all tasks of the guided journey, leave the page guided journey task codes blank.
   c. Set Guided Journeys Code at the Section Level: This property controls the display of the guided journey in the <section name> section where <section name> is the name of the section in the page where you want to enable the guided journey. Set it with the journey code you noted in step 4 under Configure a Guided Journey for Explore Tab in Journeys.
   d. Set Guided Journeys Task Codes at the Section Level: This property controls the display of guided journey tasks in the <section name> section where <section name> is the name of the section in the page where you want to enable the guided journey. Set it with the task codes you noted in step 6 when creating the section level guided journey tasks. Use the + icon to add more rows to display multiple tasks.

If you want to show all tasks of the guided journey, leave the detail section guided journey task codes blank.

8. Click **Preview** in VB Studio to view the guided journey details.

   When Carla navigates to the Explore tab of Journeys, she can view the page level guided journey tasks in a carousel on the top of the page and section level guided journey tasks as links on the bottom of the page.

For more information, see these topics:

- *How do I associate a guided journey to different journey pages, tabs, and tasks?*
- *How do I associate guided journey tasks with a journey task?*

6 Contextual Journeys

Overview of Contextual Journeys

For more information, refer to this topic: *What are contextual journeys?*

Create a Contextual Journey

You're creating a contextual journey that will display to Meg who is a line manager in Vision Corp, Redwood Shores when she's transferring Elizabeth, her direct report.

The contextual journey is intended to take Meg through the transfer process, complete required tasks, and finally initiate the transfer action.

Before You Start

- Create tasks relevant for the transfer like review of assignment information, meet the new manager, initiate handover of the employee's responsibilities, watch a video on how to transfer, and start the transfer.
- Since the contextual journey is specific to a specific legal employer and location, you configure those attributes accordingly.

Create a Contextual Journey for Transfer

1. In the Setup and Maintenance work area, go to the Checklist Templates task.
2. Create the Contextual Journey in Checklist Templates with the new category Contextual Journey.
3. Click **Add** and enter details as described in this table. For other fields, use default values.

Field	Value
Name	Contextual Journey for Transfer
Status	Active
Country	All Countries
Category	Contextual Journey
Context	My Team
Action Name	Transfer
Archive After Months	3
Purge After Months	3

Field	Value
Completion Criteria	All mandatory tasks completed
Days for Completion	0

4. Click **OK**.
5. In the Configure Criteria section, click **Add**.
6. In the Condition Builder dialog box, click **Create Group**.

Field	Value
Attribute	Legal Employer
Operator	Equals
Ignore Case	Leave as is
Operand Type	Constant
Operand Value	Vision Corp

7. Click **OK**. Repeat step 7 to add Redwood Shores for the Location attribute using `And` as the expression connector.
8. Click **OK** and **Save**.

When Meg initiates the **Transfer** action for Elizabeth Marvey, she navigates to a page where she can preview the tasks in the contextual journey. She clicks **Start This Journey** to begin the tasks.

Related Topics

How You Manage Contextual Journeys

When you initiate a quick action from Me, My Team, or My Client Groups based on the setup there might be contextual journeys to help you complete tasks before you actually perform a transaction.

For example, when you initiate a transfer you might see a journey that includes tasks you need to do before you finally perform the action.

If you're an employee, line manager, or HR specialist here's what you see when you initiate a quick action that has a contextual journey associated:

Contextual Journey Availability	What You See
If there's only 1 configured contextual journey that qualifies for the quick action.	The preview page with the tasks of that contextual journey appears and you can click **Start This Journey**. Clicking **Continue Without Journey** directly takes you to the respective quick action page. **Continue Without Journey** is available only to HR specialists, by default. Line managers and employees won't be able to see this button.

Contextual Journey Availability	What You See
If there's more than one contextual journey that matches the criteria.	The contextual journey gallery page displays where you can select a specific contextual journey from the options and start the journey.
If there's already an in-progress assigned contextual journey and other contextual journeys also exist for the selected quick action.	The in-progress journey displays. You can use **Resume** to continue the journey or select a new journey.
If there's no contextual journey configured for a quick action.	The transaction page directly opens for the quick action.

Here are a few points to note:

- When a contextual journey displays, the user initiating the quick action can select a contextual journey and act on it. The contextual journey can't be edited or deleted.
- Completed contextual journeys aren't displayed.

7 Surveys Using Journeys

Overview of Surveys in Journeys

Use Survey Journeys to create surveys and assign it to people in your organization. For example, create survey journeys for regular pulse surveys to seek feedback on workplace satisfaction or a general survey to provide feedback on the onboarding process.

Setup

Unlike a regular journey template, the attributes that you configure for a survey journey are different. When you select the Survey journey category in the Create Checklist dialog box, you need to choose one of the survey subtypes shown in this table:

Survey Subtype	Questionnaire Subscriber	How to View Survey Results
General	Journeys Survey	You have to create your own BI or OTBI report.
Touchpoints	Touchpoints	You have to use the Oracle Fusion Touchpoints dashboard. Here are some points to note: • Currently, **Touchpoints** surveys are distributed only through journeys. • To use **Touchpoints** surveys, you have to enable journeys. For more information about Touchpoints, see the Using and Administering Touchpoints guide on Oracle Help Center.

A survey journey can have only one task of the type Questionnaire. This is the default and can't be changed.

Message

You can personalize the survey title, subtitle, welcome notification text, and completion message that displays when the survey journey is assigned to workers using the options in the Message tab.

Schedule

You may need to assign a survey journey at regular intervals or may be just once. You can use the options in the **Schedule Allocation** tab to specify the frequency at which a survey should be assigned. The period summary is generated and lists the periods based on the frequency. Although these periods are Active by default, if you don't want the survey journey to be assigned during a specific period, you can deselect Active.

You can choose these **Repeat** options:

- Specific - Indicates the assignment is on specific dates.

- Day - Indicates the assignment is on a daily basis.
- Week - Indicates the assignment is on a weekly basis. For example, every Monday.
- Calendar month - Indicates the assignment is on a monthly basis. For example, every 5th day of the month or every second Monday of the month.
- Year - Indicates the assignment is every year. For example, every 5th day of a specific month or every second Monday of a specific month in the year.

Based on the start date and the frequency in the schedule, the assignment occurs in specific periods that fall between the start date and end date of the recurrence. The **Number of Runs Per Period** drop-down list allows you to configure the number of times that the system tries to schedule a survey journey in case of earlier scheduling failures or when a new population is added to the criteria. The journey assignment ends based on the configuration for End Recurrence. There’s no way to update completed periods in the schedule.

Note that you need to set up the schedule with at least 1 active period to assign a survey journey.

General surveys in journeys expire on the period end date set while defining the survey journey. For this to automatically happen, you need to run the **Process HR Checklist and Tasks** ESS process on a daily basis.

On completion of the survey period, the survey journey can no longer be assigned. Additionally, the survey assignee can no longer respond to the survey.

Survey Assignment

Configure the criteria to determine the population. Only those persons who meet the criteria such as legal employer and business unit are assigned the survey journey. However, you can assign the survey to assignees only if the date falls within one of the active periods in the survey schedule.

Here are some points to note:

- Legal Employer and Business Unit are the only two attributes that are supported when you configure the criteria to determine the population.
- The survey journey needs to be manually assigned at least once for the recurring journey schedule to be initiated.

You can’t assign a survey journey by using HCM Data Loader (HDL) or REST API because it has a schedule.

Allocate Scheduled Journey ESS Process

Once the configuration is complete, the survey journey is available in the Journeys app. The Allocate Scheduled Journey ESS process which runs daily automatically assigns the journey. If it's a recurring survey journey, the process checks for new population within that period and assigns the survey journey only to them.

Once the surveys are assigned, you can use the Scheduled Allocations tab in the Checklist Templates page to review the status of scheduled survey journeys. If a particular allocation needs an update, administrators can drill-down to that allocation and make changes by deselecting a person or period.

Here are some points to consider:

- You can’t change the category of an existing journey to Survey journey. Instead, define a new survey journey.
- The display of the survey is based on the way the questionnaire is configured. A questionnaire can display one question on each page, one section on each page, or all questions on a single page.
- You can't edit an assigned survey journey. However, you can force complete or delete the assigned survey journey from the Assigned Journeys UI.

- You can still edit the survey journey template for open survey periods.
- If the survey task is completed by the performer, it can be reopened.
- You can't configure reminders for tasks in a survey journey. However, you can send reminders for survey journeys from the Assigned Journeys UI or by configuring journey nudges.
- When you configure a period in a survey journey, these items are determined:
  - Dates during which the ESS process will be run.
  - Eligible population in the period to assign the journey.
- You can't assign a survey journey to a worker in the same survey period multiple times, even if the earlier instance of the survey journey is completed by the worker.
- Survey journeys aren't available in the Checklist Tasks and Onboarding pages.
- There's no option to mark the answer to a survey question as anonymous.
- The survey results aren't purged from the application when the journey is purged.

Related Topics

- How You Use Nudges to Send Journey Reminders

How You Schedule Surveys in Journeys

When you create a survey journey, you need to specify its recurrence frequency to decide when the survey should start and end and how many times the survey should run within this specific period.

In addition, you need to specify key attributes.

Configure Attributes

1. On the application home page, click the **My Client Groups** tab.
2. Click **Show More** after the list of quick actions.
3. Click the **Checklist Templates** quick action in the **Employment** area.
4. Search and select the survey journey.
5. Click the **Schedule Allocation** tab.
6. Select the recurrence frequency of the survey by selecting the required option from the **Repeat** field. If you want to create a survey with a custom frequency that's not daily, weekly, or monthly, select **Specific**.
7. Complete the fields for each of these recurring frequencies:
   - Day - Daily frequency
   - Week – Weekly frequency
   - Calendar month - Monthly frequency
   - Year - Yearly frequency
   - Specific - Specific frequency
8. In the **Number of Runs Per Period** field, specify how often you want the survey engine to run during a period so that the survey gets assigned to new people in the target population. For example, let's say you scheduled a monthly survey for the 1st of every month. If you selected the option **Every day of the period**, the survey engine will run every day of the month, identify new people who join at any time during the month, and assign

the survey to them. But if you selected **Once per period**, the survey engine will run only once, on the 1st of the month, and will assign the survey to new people only in the next month.

The Allocate Scheduled Journeys process automatically assigns the journey. This process checks for new population within a period and assigns the journey only to them. However, the process has no seeded schedules and the user needs to schedule the process if they want to use it to assign survey journeys.

9. Enter the analysis period. To specify an analysis period of 4 weeks, select **4** from the first list, and **Weeks** from the second list.
10. Enter the threshold score value.
11. Click **Generate**. The Period Summary section displays the start and end dates of each period in the selected frequency. Employees can access the survey any time during each of these periods. If you want to make changes to the number of occurrences or the survey end dates, click **Generate** again to refresh the period list.

    Note these points:
    - You can't generate periods for a custom survey that has the frequency type as **Specific**. In this case, you have to manually enter the start and end dates for each period.
    - You can't assign the survey on dates outside of the generated periods. If you want to add such dates, you need to change the frequency type to **Specific** and manually add those dates.
    - If you don't want to run the survey on certain dates, say for example weekends or holidays, you can clear the **Active** check box next to those dates in the Period Summary section.
    - You can clear or select the **Active** check box next to a period only if its start date is on or after today's date and the survey engine hasn't already run for today's date.
12. Click **Save**.

The survey is assigned to the target population at 12 AM UTC time of each survey period's start date.

After you've created the survey and assigned it to employees, you can extend the survey for a longer period in the same recurrence frequency. To do this, edit the checklist template task and change the end date of the last period in the survey, if the survey hasn't already been assigned during that period. However, if you want to change the recurrence frequency from daily to weekly, it's recommended that you end the daily frequency or make it inactive and create a new checklist template task for the weekly frequency.

Daily Frequency

Complete the fields for daily recurrence as shown in this table:

Field	Value	Sub Value
Start On	Specify the start date of the survey.	
Repeat	Day	
End Recurrence	Option 1: End the survey after a specific number of occurrences.	Specify the number of occurrences.
	Option 2: End the survey on a specific date.	Enter the end date.

Monthly Frequency

Complete the fields for monthly recurrence as shown in this table:

Field	Value	Sub Value
Start On	Specify the start date of the survey.	
Repeat	Calendar month	
Repeat on This Day	Option 1: Repeat on a specific date in the month.	
	Option 2: Repeat on a specific day of the month. For example, the first Monday of every month.	
End Recurrence	Option 1: End the survey after a specific number of occurrences.	Specify the number of occurrences.
	Option 2: End the survey on a specific date.	Enter the end date.

Yearly Frequency

Complete the fields for yearly recurrence as shown in this table:

Field	Value	Sub Value
Start On	Specify the start date of the survey.	
Repeat	Year	
Repeat in This Month	Select the month on which you want to send the survey every year.	
Repeat on This Day	Option 1: Repeat on a specific date in the month.	
	Option 2: Repeat on a specific day of the month. For example, the first Monday of every month.	
End Recurrence	Option 1: End the survey after a specific number of occurrences.	Specify the number of occurrences.
	Option 2: End the survey on a specific date.	Enter the end date.

Specific Frequency

Let's say you want to create a survey every alternate day of the week, you need to create a custom frequency. Complete the fields as shown in this table:

Field	Value	Sub Value
Start On	Specify the start date of the survey.	

Field	Value	Sub Value
Repeat	Specific	
End Recurrence	Option 1: End the survey after a specific number of occurrences.	Specify the number of occurrences.
	Option 2: End the survey on a specific date.	Enter the end date.

Note that for a custom frequency, clicking **Generate** won't create the start and end dates in the Period Summary section. You need to manually add each period of occurrence and specify the start and end dates. In this example, you will add alternate days of each week that you want to run the survey for.

Notify Employees When a Survey is Assigned

Here's how you can notify employees when the survey is assigned to them:

1. Click the **Display Settings** tab.
2. Select the **Send notification on checklist allocation** check box. This sends notifications for each time the survey is assigned to employees in the configured recurrence frequency.
3. If you want to send a notification to the assignee when the HR specialist or manager decides to manually mark the survey as complete, you can select the **Send notification when checklist is force completed** check box.

These notifications appear in the employees' worklist when they click the **Notifications** icon in the global header.

Example of Creating a Survey in Journeys

This example shows how to create a general survey and assign it to new hires to get their feedback on the onboarding process.

Summary of Tasks

1. Create the questionnaire for the survey by using the Questionnaires application.
2. Create and configure the survey by using the Checklist Templates task. This involves three subtasks:
    a. Creating the survey journey.
    b. Associating the questionnaire with the survey journey.
    c. Specifying the attributes of the survey, such as its frequency.
3. Assign the survey to employees using the Journeys application.

Create the Questionnaire

For more information about creating a questionnaire, refer to the *Questionnaires* section in the Workforce Profiles chapter of the Using Common Features for HCM guide.

Create the Onboarding Experience Survey Journey

The general survey is a type of survey journey that's created using the Checklist Templates task.

Here's how you create the survey journey:

1. On the application home page, click the **My Client Groups** tab.
2. Click **Show More** after the list of quick actions.
3. Click the **Checklist Templates** quick action in the **Employment** area.
4. Click **Create**.
5. Complete the fields as shown in this table.

Field	Value
Name	Name of the survey journey.
Checklist Code	The code is auto-populated. You can change it if required.
Country	Select the country to which the survey is applicable.
Category	Survey
Survey Subtype	General
Archive After Months	The survey journey is archived these number of months after its expiration or completion by the employee or HR specialist. When a survey journey is archived, it no longer appears in the application. But it’s still present in the archive tables in the database. The responses provided by employees to survey questions aren't archived. They're available in the database for reporting purposes.
Purge After Months	The archived survey journey is purged these number of months after its expiration or completion by the employee or HR specialist. Purged survey journeys are permanently removed from the archived tables. The responses provided by employees to survey questions aren't purged. They're available in the database for reporting purposes.

6. Click **OK**.
7. Review the details on the **General** tab and edit the other details as required. You can enter the effective start and end dates for the survey journey configuration.
8. To finalize the survey and use it immediately, set its status to **Active**. Otherwise, set it to **Draft**.
9. Click **Save**.

Associate the Questionnaire with the General Survey

The next step is to associate the questionnaire with the general survey journey.

Here's how you do it:

1. On the **Tasks** tab of the checklist page, click the **Create > Create Task**.

2. Complete the fields as shown in this table.

Field	Value
Name	Name of the task.
Code	The code is auto-populated. You can change it if required.
Status	The status is auto-populated. You can change it if required.
Description	Enter a description for the survey questionnaire.
Task Type	The default is **Survey**. Leave as is.
Questionnaire	Select the questionnaire to be used in the survey.

3. Click **Save and Close**.

A general survey can have only one task.

How You Assign a Survey Journey

If a survey journey is configured and available on the Explore tab, you can assign this to people in your organization.

When assigning a survey journey, you can choose the recurrence options in the Repeat drop-down list. Based on the recurrence configuration, these are the Repeat options available for surveys:

- As per schedule - Assigns the survey journey in the respective period under which the assignment date falls.
- Never – Assigns the survey journey on an ad hoc basis but the date needs to fall within a specific period.

You can only assign survey journeys in the active periods defined in the schedule of a survey journey.

Employee Experience

If a survey is assigned to you, you receive a notification. You can also see the survey journey in your My Journeys tab. You can then respond and submit the survey journey. Once you submit the survey you can't edit the response and resubmit the survey. You also can't respond to the survey once it expires.

Here are a few points to note:

- You can't create a Survey journey using Create Journey on the Explore tab in Journeys and you can't create personal journeys of the Survey category.
- The My Tasks tab in Journeys app doesn't display the survey task.
- The completed survey journeys are archived and purged periodically.

Use Cases for Surveys in Journeys

This table shows some common scenarios where surveys are used in journeys and the steps to configure each:

Use Case Scenario	Description	Configuration Steps
Configure a survey journey that's assigned once and needs to be completed within 3 days after its assigned.	An HR specialist wants to assign a one-time survey journey to obtain details of the workers attending a department's All Hands Meet in the Delhi office. The survey journey is assigned on 01-Jun-2024 and workers need to respond on or before 04-Jun-2024.	1. Create the survey schedule by entering these values: a. Start Date: 01-Jun-2024 b. End Recurrence: Specific Date c. End Date: 04-Jun-2024 2. Assign the survey to the required set of people.
Extend the deadline of the survey journey by 2 days on the last day.	Since many workers haven't responded to the survey requesting their details, the HR specialist wants to extend the survey duration to allow workers to respond on or before 06-Jun-2024.	1. Edit the end date value as follows in the Period Summary section under the Schedule Allocation tab: a. End Date: 06-Jun-2024
Verify personal details of workers in an annual survey journey.	An HR specialist wants to assign an annual survey journey to workers to verify their personal details. The journey needs to be a recurring survey for the next 5 years. The survey journey needs to be assigned every year on 01-Jan-2024 until 01-Jan-2028. Additionally, the survey should be available for workers to respond until 20th January of each year.	1. Create the survey schedule by entering these values: a. Start Date: 01-Jan-2024 b. Repeat: Year c. Occurrences: 5 2. By default, the end date for each period is set to 31st December. Therefore, modify the end date in the period summary as 20th January for each period. 3. Assign the survey to the required set of people.
Update the questionnaire associated with the survey journey to include 2 new questions.	A survey journey is configured with the following questionnaire: Annual Survey - Personal Details. The questionnaire has 5 questions and is assigned with a recurring schedule. Two new questions need to be added from the 2nd year onward.	1. Edit the Annual Survey - Personal Details questionnaire to include 2 new questions. 2. When the 2nd instance of the survey journey is assigned, the survey will include the 2 new questions that were added to the questionnaire.
Replace the questionnaire associated with the survey journey with a new questionnaire.	A survey journey is configured with the following questionnaire: Annual Survey - Personal Details. The questionnaire has 7 questions and is assigned with a recurring schedule. The questionnaire needs to be replaced from the 3rd year onward.	Even if you replace the questionnaire of the survey with a new questionnaire, the existing schedule continues to use the associated survey questionnaire when the survey was first assigned. However, you can follow these steps to use the new questionnaire: 1. Delete the future recurrences in the schedule. 2. Associate the new questionnaire. 3. Create a new schedule with the required start date and recurrence.

Use Case Scenario	Description	Configuration Steps
		4. Assign the survey to the required set of people.

You need to run the **Process HR Checklist and Tasks** process daily to automatically uptake the changes you made to the survey journey.

Create Quick Surveys in Journeys for Small Set of Workers

You can create a quick survey or poll to collect feedback from your directs on important topics relevant to their work such as projects, schedule, work environment, skills, competencies, collaboration, training, availability, and preferences.

You can use journeys and questionnaires to create the survey and then manage the survey.

Create Survey

Use the Create Survey quick action under the My Team tab to create the survey. You have the option to copy from an existing survey, create a new survey, or use AI Assist. After entering the survey details, you can add questions from the question library or create your own questions. A maximum of 10 questions can be added for a survey. You can perform these actions when you create the survey:

- Modify the survey by making changes to existing questions
- Add new questions
- Reorder questions
- Remove questions

Manage Survey

After you create the survey, you can set the start and end date, set reminder options for assignees, and assign it to your direct reports. Once assigned, you can change the survey details if needed. For example, you can extend the survey end date if the workers have not completed the survey and assign the survey to a new set of workers. The extended date is also applied to the new assignees.

You can assign or edit a survey from the Explore tab.

Survey Analytics

As a manager, you can review and analyze feedback from your employees on important topics using the Analytics UI. You can create a survey on many different topics that are relevant to you and your employees. For example, you can find out employee information such as the following:

- If they're happy with their work environment.
- Do they want more training?
- Do your employees want to develop their skills and competencies?

- Are they satisfied with their projects and schedule of work?

When you design the survey, you decide how you want to display the analytics. For example, for single and multiple choice questions, you can display the results as a pie chart, donut chart, vertical bar graph, or horizontal bar graph.

Use the Analytics UI to see how many people took the survey you assigned to them and the results of the survey based on their responses. You can also view the individual text responses of each participant. Find the results of the survey in Journeys Activity Center under the Explore tab.

To see the survey results and analytics, run the Process Survey Response Summary process daily.

Points to Consider

- You can only create a quick small survey with a limited set of workers by using the Create Survey quick action. You can’t create an extensive survey and assign it to a large population.
- Surveys created by a manager are personal surveys available only to them and not to other managers. These personal surveys are available only within the survey flow.
- Surveys are non-recurring and have an end date.
- You can't edit the survey questions if the assignee has already responded to them.
- The display of AI Assist is controlled through the **showAIAssist** page property in Visual Builder (VB) Studio. The default value of the property is **false**.
  - If the property is set to **true**, then the user will see the AI Assist option when configuring a survey.
  - If the property is set to **false**, then the user won’t see the AI Assist option when configuring a survey.
- You can't download the survey responses.

Related Topics

- Questionnaires

Compare Journey Questionnaires, Survey Journeys, and Manager Surveys

This table shows the comparison between journey questionnaires, survey journeys, and manager surveys based on the configuration criteria:

Criteria	Journey Questionnaires	Survey Journeys	Manager Surveys
Where to configure?	My Client Groups > Talent > Questionnaires Associate the questionnaire you created with a journey task of type Questionnaire in a journey template.	My Client Groups > Talent > Questionnaires Create the Survey Journey in Checklist Templates by using the Survey category. Specify the survey subtype as either General or Touchpoints.	Team Activity Center page > Team Actions or My Team > Employment > Create Survey quick action

Criteria	Journey Questionnaires	Survey Journeys	Manager Surveys
		Associate the questionnaire you created with the journey task of type Questionnaire in a journey template of category Survey.	
Which questionnaire subscriber do I select?	For a questionnaire task in a Guided Journey, you need to select Guided Journeys as the subscriber. For a questionnaire task in other journey categories, you need to select HR Checklists as the subscriber.	For a general survey, you need to select Journey Surveys as the subscriber. For a touchpoints survey, you need to select Touchpoints as the subscriber.	Not applicable
Can I automatically assign the survey?	Yes, based on an action or event.	Yes, based on the criteria and schedule.	No
Can I configure a recurrence?	Yes, at run time. When assigning the journey, you can specify a recurring schedule.	Yes, at design time by using the Schedule Allocation tab when configuring the survey journey template.	No
Can I specify the target population?	Yes, by using Eligibility Profiles when configuring the questionnaire task or configuring the journey template.	You can only specify the Legal Employer and Business Unit.	You can only assign people to the directs of the line manager.
Can I specify the duration when a questionnaire or survey is active?	Yes, by using Expiry Duration when configuring the task.	Yes, by using the schedule configured under the Schedule Allocation tab of the journey.	Yes, Survey Start and End Date.
Can I specify when a questionnaire or survey becomes inactive?	Yes, by using Expiry Duration when configuring the task.	Yes, based on the recurrence duration. Once the new occurrence is assigned, the earlier occurrence will automatically expire.	Yes, by using End Date when assigning the survey.
Can I specify the date by when workers need to complete the questionnaire or survey?	Yes, by using Target Duration when configuring the task.	Yes, by using the schedule configured under the Schedule Allocation tab of the journey.	Yes, by using the End Date when assigning the survey.
Can I delay assigning the questionnaire or survey?	Yes, by using Delay Duration when configuring the task.	Yes, by using the schedule configured under the Schedule Allocation tab of the journey.	Yes, by using Start Date when assigning the survey.
Can I specify the questionnaire or survey responder?	Yes, you can specify as Worker, Line Manager, AoR, or User.	The survey is always assigned to the journey assignee.	The survey is always assigned to the journey assignee.
Can I specify the layout to display questions?	No	Yes	No

Criteria	Journey Questionnaires	Survey Journeys	Manager Surveys
Is there a limit on the number of questions?	No	No	Yes, 10 is the limit.
Can I add comments when answering the questionnaire or survey?	Yes, as part of task and question comments.	Yes, as part of question comments.	Yes, as part of question comments.
Can I add attachments when answering the questionnaire or survey?	Yes, by enabling the Attachments checkbox when configuring the task.	No	No
Can I configure other features by using display properties?	Yes	No	No
Can I send reminder notifications?	Yes, you can configure reminders at the task level.	Yes, by using Nudges for Journeys.	Yes, you can configure reminders when assigning the survey.
Can I add other tasks to the journey template?	Yes	No	No
Can I add the Note Board and What's Happening sections?	Yes	No	No
Can I configure journey template level security?	Yes	Yes	No
Can the journey template be reused by others?	Yes, it's a global template.	Yes, it's a global template.	No, it's a personal template.
Can I make a questionnaire or survey dependent on another task?	Yes, you can configure a preceding task in the journey template.	No	No
Can I configure an offset duration?	Yes	No	No
Can I add notes or instructions?	Yes	No	Yes
Can I add a completion message?	No	Yes	No
How can I answer the questionnaire or survey?	Survey respondents can answer from the My Journeys or My Tasks tab. The line manager and Areas of Responsibility (AoR) can answer from the Assigned Journeys tab. You can configure this based on the display properties.	Survey respondents can answer from the My Journeys tab. The line manager and AoR can't answer on behalf of the performer.	Survey respondents can answer from the My Journeys tab. The line manager and AoR can't answer on behalf of the performer.
Who can view questionnaire or survey responses on the UI?	The Task Performer, Line Manager, and AoR. You can configure this based on the display properties.	The Line Manager and AoR. The survey performer can't view the responses after submitting them.	The Line Manager and AoR. The survey performer can't view the responses after submitting them.
How can questionnaire or survey responses be reported?	By using OTBI and BI Publisher.	By using OTBI and BI Publisher.	By using BI Publisher.

8 Synchronize Journey Template Changes

Overview of Synchronizing Assigned Journey Attributes

You may want to include any journey or task related changes in already assigned journeys. You can do this using the **Update Assigned Journey Attributes Based on Modified Journey Template** process.

You can run this process in the Scheduled Processes area only for journeys and tasks that are in progress and not in terminal status. Based on the parameters you specify, the process updates those attributes in the assigned journey or task. You require the Run Global HR Processes function privilege to run this process manually.

Process Parameters

When running the process you need to specify the values for the parameters listed in this table.

Process Parameters	Details
Checklist Name	List of checklists that can be updated. The checklist names display as IDs in the ESS Process Details dialog box.
Task name	List of tasks that can be updated. The task names display as IDs in the ESS Process Details dialog box. You must provide a checklist name if you provide the task name parameter.
Person Numbers	Person number or comma separated values for person numbers. If you don't provide person numbers, the ESS process synchronizes attributes across all open assignments of that journey and task.
Configuration	Configuration comprises the checklist and task attributes enabled for synchronization on the **Configurations** tab in the Checklist Templates page. When you add a configuration, you need to enable it first and then enable some or all of the attributes that you want to synchronize.

Process Results

You can use the log files to validate the synchronization process. If you try to update a task that doesn't exist in the selected checklist, the process stops.

Points to Note

You can't use the ESS process to assign a new task that you add to a checklist template. Similarly, it can't be used to delete an assigned task if you delete the task from a checklist template. You will need to make such changes through the user interface, HDL, or REST API. You can't use the ESS process to update the Basic eSignature, Embedded Learning, I-9, OPA, Document, Questionnaire, and Configurable Form task types.

Any task related change that you make in these scenarios aren't synchronized:

- When you change the task type, for example, from Manual to Video.
- When you update the configuration of an existing Questionnaire and Configurable Form task.
- When you change the preceding task configured in a checklist.

Journey Attributes Synchronized During Process Run

Attributes updated at the journey and task level during the Update Assigned Journey Attributes Based on Modified Journey Template process are listed here.

Level	Tabs	Synchronized Attributes
Journey	General	• Checklist Name • Description • Archive After Months • Purge After Months
	Message	• Title • Welcome Text • Background Image URL • Thumbnail Image URL • Template for Assigned Checklist • Combined Task Notification Template • Force Complete Notification Template • Contacts • All supported checklist display properties Display Name Format on Journey Card isn't synchronized.
Task	General	• Name • Description • Sequence • Enable expiry • Target Duration • Required • Report Path • Signature Type • Template ID • Attachment • Comments • Attachments to Document Records • Attachments Are For • Document Type • Activation Criteria • OTBI Analytics Path

Level	Tabs	Synchronized Attributes
		• Analysis Parameters • Task Configuration • Application Task • Learning Item Title • URL • Notes • Complete • Mark as Not Applicable • Save as Draft • Add to Calendar • Activity Action 1 • Activity Action 2 Task Owner, Task Type, specific task types such as Basic eSignature, and Embedded Learning aren't synchronized.
	Notification and Reminders	• Notification Overrides ◦ Notify Performer • Task Alert Templates ◦ Template for Performer ◦ Template for Owner ◦ Template to Notify Performer on Task Expiry ◦ Template to Notify Owner on Task Expiry ◦ Template to Notify Performer About Task Marked Not Applicable ◦ Template to Notify Owner About Task Marked Not Applicable ◦ Template to Notify Performer of Force Closed Task ◦ Template to Notify Owner of Force Closed Task • Reminder Template Enable reminder isn't synchronized.
	Notes	Supported.
	Display Settings	All supported task display properties.

9 Configure Task Types

Overview of Journey Tasks

This topic describes the key features about tasks and the task library.

Tasks

You can configure tasks as optional or required.

When you send a reminder, the reminder is per task and not a single reminder for multiple tasks. Tasks that are incomplete in a particular step are automatically carried forward to the next step in the onboarding process.

Although you can specify task description this isn't visible to task performers or editable in the task pages.

Dependent Tasks

You can also configure tasks as having dependent tasks. For example, a task where the worker needs to request for their identity badge could have a preceding task where the worker needs to verify their personal information details.

Here are a few points to note:

- A dependent task can have only 1 preceding task.
- The dependent task will appear grayed out (displayed with a locked icon) until the preceding task is in terminal status.
- HR specialists and line managers can't send reminders, reassign, or edit dependent tasks that are disabled.

Task Library

The task library is a repository of reusable tasks from which you can select and add tasks to a journey template or an assigned journey. The tasks in the library comprise both predefined tasks and personal tasks.

Any changes you do to the task details of a task in the task library won't be reflected in a task that's already added to a journey template. When a task is added from the task library, eligibility profile isn't evaluated since tasks in the task library don't have eligibility profile associated.

You can't add tasks from a task library to a contextual or guided journey because tasks created in contextual and guided journeys are different. Not all task attributes are supported for tasks that are part of a contextual or guided journey.

The Enterprise Onboarding Step journeys that you create on the Tasks tab of an Enterprise Onboarding category journey can't be added to the task library.

When selecting a task from the library you can use the task description to see if it’s relevant for the journey.

Points to Consider	Predefined Tasks	Personal Tasks
Who can access the tasks?	Users having access to Checklist Templates	Users having access to Create or Manage Journeys

Points to Consider	Predefined Tasks	Personal Tasks
How do I add tasks to the library?	• Using the Task Library tab in the Checklist Templates setup page. • Selecting Add to Library on the Tasks tab of the checklist template.	You have the option to save a task to your personal task library when you create a new task: • When creating a personal journey • When editing a personal journey • When managing an assigned journey
How do I manage these tasks?	Using the Task Library tab in the Checklist Templates setup page.	Currently it's not possible to edit or delete personal tasks.
How do I use these tasks?	You can select a predefined task in these scenarios: • When creating a personal journey • When editing a personal journey • When managing an assigned journey	You can select a personal task in these scenarios: • When creating a personal journey • When editing a personal journey • When managing an assigned journey
Who can use these tasks?	Anyone	Only you

Task Types in Journeys

For more information, refer to this topic: *What are the task types in journeys?*

Considerations for Creating Journey Tasks

Whether it's a predefined task or a brand new task, a task becomes relevant only when you add it to a journey. Most often, you can use predefined tasks that are available but sometimes you may have to create new tasks altogether.

Watch video

Here are some scenarios in which you can create a new task

- When you create a personal journey
- When you edit a personal journey
- When you manage an assigned journey

This table lists the things you should keep in mind when selecting tasks from task library or creating new tasks.

Task	What task attributes can you create or modify	Things to keep in mind
Added from library	For Manual, External URL, Video, and Document task types you can change all task attributes. For other task types, you can modify only some of the attributes.	Tasks are assigned to the performer as of the date you specify in the Assign Date field. Any notes that are part of the library task appear in the notes field with the HTML tags.
Created newly	You can create new tasks only of the type Manual task, External URL, Video, Document, Learn Community, and Learn Enrollment.	You can save the task to your personal task library. The Notes field in the task page when you add a new task doesn't support rich text editor.

Here are a few points to note:

- The task that you add to an assigned journey or a personal journey can't be a predecessor task to another task and can't have any tasks that precede it.
- New tasks are added to the end of the existing task list in the journeys page.
- After you assign a task to a performer, you can edit the due date, reassign the task, or remove the task.
- It's recommended that you don't create more than 20 tasks in a single journey.

How You Create Journey Tasks

For more information, refer to this topic: *How do I create journey tasks?*

10 Configure Task Groups

Overview of Task Groups in Journeys

A task group is a grouping of common tasks that you can reuse in multiple journey templates. For example, you can create a group of common tasks to use in various onboarding journeys.

You can configure a task group using the Task Groups tab on the Checklist Templates page.

Create Task Groups

Any user who has access to Checklist Templates can create task groups but if you want to restrict the access, you need to configure the role in Category Security. For example, if you add the HR specialist role, only users with that role can create task groups. Roles that you give access to can use Task Group to create a task group.

Configure Task Groups

A task group acts like the parent task to which you add child tasks. You can include one or multiple tasks and keep them as standalone, dependent, or a combination of both. You can also configure task groups that are dependent on each other.

You can specify the name and other details such as the eligibility profile and completion criteria at the task group level or at each specific task level. When you add tasks to a task group, you can either create a new task or add an existing task from the task library. After you create the task group, you select this task group from the Task Group Name drop-down list when adding it to journey template.

Track Usage

If you want to see where a particular task group is used, you can use the Usage tab on the Task Groups page. When you make a change to a task group, the changes reflect in all journey templates in which it is used. When a journey with a task group is assigned, the name of the task group doesn't display anywhere in the Journeys app. Assignees only see a sequence of tasks that they need to complete. The tasks display based on any activation criteria or dependency that you have configured on the setup side.

Example of Creating a Task Group in Journeys

As a HR specialist, you need to create a task group that includes 3 common tasks that new hires need to do as part of their onboarding. You add this task group to an onboarding journey template that you created previously.

Before You Start

1. Create an onboarding journey template titled New Hire Onboarding for Vision Corp.
2. This example assumes you have created 2 tasks with sequence 1 and 2 respectively. Task 1 is Welcome the New Hire and task 2 is Sign the Confidentiality Agreement.

Create the Personal Information Task Group

1. Go to My Client Groups > Employment > Checklist Templates quick action or Setup and Maintenance > Checklist Templates task.
2. Click **Task Group** on the Checklist Templates page and then click **Create**.
3. Specify the name of the task group and click OK.
4. Enter values as indicated in this table. For other fields, use the default values.

Field	Value
Name	Personal Information
Status	Active
Description	Task group to use in onboarding journeys.
Completion Criteria	All mandatory tasks completed

5. Click **OK**.
6. Click **Save** and then click the **Tasks** tab.
7. Click **Create** and then click **Create Task**. Enter details for Task 3 and repeat the same for Tasks 4 and 5.

Field	Task 3	Task 4	Task 5
Name	Watch the Video on Updating Personal Details	Update Personal Info	Update Contact Info
Status	Active	Active	Active
Sequence	3	4	5
Required	Yes	Yes	Yes
Preceding Task	Sign the Confidentiality Agreement	Not applicable	Not applicable
Target Duration	2 days	2 days	2 days
Performer	Worker	Worker	Worker
Owner	Initiator	Initiator	Initiator
Task Type	Video: Embedded URL: URL	Application Task: Personal Details	Application Task: Contact Info

8. Click **Save and Close**.

Include Task Group in New Hire Onboarding for Vision Corp Journey

1. In Checklist Templates, search for the New Hire Onboarding for Vision Corp journey template.

2. Open the template and click the Tasks tab.
3. Click **Create Task from Task Group**.
4. Enter values as indicated in this table. For other fields, use the default values.

Field	Value
Name	Personal Information
Sequence	3
Required	Yes
Preceding Task	Sign the Confidentiality Agreement
Task Group Name	Personal Information

5. Click **Save and Close**.

When this journey is assigned, workers will see only the list of tasks based on the sequence. The name of the task group won't display in the Journeys app.

Example of Determining Task Performers Only After a Specific Task is Completed

For certain tasks, you may not want to evaluate the task performer when the journey is assigned to the worker.

For example, a worker's Line Manager or Areas of Responsibility (AoR) leaves the organization or has a change in their role before they are assigned the task to perform. In this case, you want to determine the task performer only at the time of actual task assignment.

To determine the task performer, you can use the Task Group feature to create a task group and add tasks to the group that you want the Line Manager or AoR to perform. In this example, as a HR Specialist, you need to create a task group that includes 3 tasks. The Line Manager and AoR need to do these tasks as part of a new hire's onboarding. You add this task group to an onboarding journey template that you created previously.

Before You Start

1. Create an onboarding journey template titled New Hire Onboarding for Vision Corp.
2. This example assumes you have created these 2 tasks with sequence 1 and 2 respectively in the onboarding journey template. In this case, the task performer is the employee.
   a. Task 1 – Welcome the New Hire
   b. Task 2 – Sign the Confidentiality Agreement

Create the Manager and HR Admin Onboarding Task Group

1. On the home page, click the **My Client Groups** tab.
2. Click **Show More** under Quick Actions.

3. In the Journeys Setup area, click **Task Groups**.
4. On the Task Groups page, click **Create**.
5. Retain the **Create task group** option.
6. Enter **Manager and HR Admin Onboarding** for the task group name.
7. Click **Create Draft**.
8. On the Overview tab of the Manager and HR Admin Onboarding page, in the Tasks section, click the **Add** drop-down list and select **New Task**.
9. Enter the values as indicated in this table for Task 3, Task 4, and Task 5 and click **Save**. For other fields, use the default values.

Field	Values for Task 3	Values for Task 4	Values for Task 5
Task Name	Review Employment Details	Send Welcome Kit	Procure Office Equipment
Sequence	3	4	5
Make this task mandatory	Yes	Yes	Yes
Performer	Line Manager	Line Manager	Area of Responsibility
Performer Responsibility Type	Not applicable	Not applicable	Human Resource Specialist
Task Type	Application Task	Manual Task	External URL
Application Task	Employment Info	Not applicable	Not applicable
Task URL	Not applicable	Not applicable	*https://www.oracle.com*
Duration	5	5	5
Time Unit	Days	Days	Days
When does the task expire?	After assigned date	After assigned date	After assigned date
After how many days?	7	7	7

10. On the Manager and HR Admin Onboarding page, click **Activate** to activate the task group status.

Include Task Group in Journey: New Hire Onboarding for Vision Corp

1. On the home page, click the **My Client Groups** tab.
2. Click **Show More** under Quick Actions.
3. In the Journeys Setup area, click **Journey Templates**.
4. On the Journey Templates page, search and click the **New Hire Onboarding for Vision Corp** journey template.
5. On the Overview tab of the New Hire Onboarding for Vision Corp page, in the Tasks section, click the **Add** drop-down list and select **Add Task from Task Group**.
6. Enter the values as indicated in this table. The preceding task is Task 2 that you earlier created in the onboarding journey template.

Field	Value
Task Name	Manager and HR Admin Onboarding Tasks

Field	Value
Sequence	3
Make this task mandatory	Yes
Preceding Task	Sign the Confidentiality Agreement
Task Group Name	Manager and HR Admin Onboarding

7. Click **Save**.

When the **New Hire Onboarding for Vision Corp** journey is assigned, only the first 2 tasks of the journey template will be assigned to the task performers. After the second task is completed by the task performer, the **Manager and HR Admin Onboarding** task group will be activated and all the 3 tasks in this task group are assigned to the respective task performers. The task performers for the 3 tasks of the task group are evaluated as of the date when the task group is activated and the tasks are assigned to the line manager and AoR accordingly.

Considerations for Creating Task Groups in Journeys

Here are some points you need to consider when creating a task group:

- You can configure task groups only on the setup side in the Checklist Templates page. This isn't possible in the Journeys app.
- You can't add a task group to an assigned journey or when creating a personal journey.
- You can't add a task group to a journey template that has the Processing Mode as BI Publisher based notification.
- Task groups that you reuse across journey templates work on the basis of reference. When you update a task group, the changes reflect in all journey templates where the task group is used.
- The Task Group name you configure doesn't display to users when a journey template that includes that task group is assigned to them in Journeys.
- A journey template can have multiple task groups. But you can't create a task group within a task group.
- You can't configure task dependency between tasks in one group and tasks in a different task group. However, you can configure dependency between 2 task groups, say you have 2 task groups – task group A and task group B, you can configure task group B to get activated only when task group A is completed.
- If a task group has a predecessor, then the task performers in the task group are evaluated when the task group is activated. This is different from performers being evaluated immediately when a journey is assigned.
- You can't assign a standalone task group to a user. A task group needs to be part of a journey template.
- A task group is supported as a part of a journey template in these operations:
  - Export and Import functionality to export or import a task group.
  - HDL support is scheduled for a future release.
- You can't create a task group in these journey categories:
  - Enterprise Onboarding

- Enterprise Onboarding Step
- Guided Journeys
- Survey Journeys

How You Decide Whether to Use Tasks or Task Groups in Journeys

Here are some differences you need to consider when creating tasks and task groups:

Considerations	Task	Task Group
Where to configure?	Checklist Template page > Task Library or in template > Tasks tab	Checklist Templates page > Task Group tab > Create
When to use?	Create tasks on a case by case basis.	Create task groups when you have common tasks that can be used in different templates. You can use multiple task groups in a journey template.
How to manage?	Manage as part of template or manage as part of task library.	Go to Task Groups and manage the tasks. Use the Usage tab to track where the task groups are used.
Is eligibility criteria supported?	Yes, supports eligibility criteria.	Yes, supports eligibility criteria.
Is task dependency supported?	Yes. Task dependency works based on a one to one mapping.	Yes, it is. • A task can be dependent on a task group. • A task group can be dependent on a task. • A task group can be dependent on a task group.
Can these features be used in all journey categories?	Yes, you can create a task of any type.	No, task groups aren't supported in categories such as Survey and Guided Journeys.
Can this be created in the task library?	Yes, you can create and add tasks to the task library.	No, a task group type can't be created in or added to the task library.
How do users access the tasks?	Access the task when the journey is assigned.	Access the tasks of a task group as individual tasks on the journeys pages. The task group name is not visible anywhere on the assigned journeys page.
After a task is assigned, and if the task configuration is updated, will the changes be reflected in assigned journeys?	Yes, using the Update Assigned Journey Attributes Based on Modified Journey Template ESS process.	No, this isn't supported for task groups.

11 Application Task Type

Considerations for Using Application Task Type in Journeys

The application task type allows the user to directly navigate to the application page from a journey task. For example, navigate to the Document Records page from the journey task to upload your degree certificate.

Here's some points to consider for using the Application task type:

- To know the list of available application tasks, you need to check the Application Task LoV on the journey task setup page.
- If a specific task is not available in the Application Task LoV, then you can create the task as an External URL task type and provide the deep link of that page (provided there is one) in the URL field. You can check for deep links available in your environment by navigating to Tools > Deep Links.
- To configure Application Tasks, the user configuring the task needs to have a person record associated to them. Additionally, the quick action should not be disabled via Structure menu.
- If a configured application task can't be accessed from a journey task, check if it can be accessed directly from Quick Actions. Also, check if the user accessing the task has the necessary security privileges for the selected task and journey assignee.
- Completing an application task doesn't automatically complete the journey task.
- You can open application task pages that are Redwood enabled from Journeys.
- Based on the profile option selected for the application task, the user is navigated to the Redwood or Responsive page for the application task.
- The Responsive page won't open if Redwood is enabled for the application task.
- If you have configured a Redwood application task and the profile option for the application task is subsequently disabled, then you won't be automatically redirected to the Responsive application page.
- The completion criteria are specific to the task for which they are configured. Therefore, you need to configure the completion criteria for each application task according to your requirement.
- You can reassign application tasks. If notifications are enabled, the person to whom its reassigned will receive the notification. Also, the task takes the user to the task performer's application task page. For example, Meg is a task performer and has been assigned the Personal Details application task. She reassigns the task to Ravi. Then, according to the application design, when Ravi accesses the application task, he will be navigated to his Personal Details page.

Example of Configuring Completion Criteria for a Journey Task

You can define rules for journey task completion based on data in the supported application objects. For example, you can define rules to ensure that a new hire has submitted the required data before marking their journey task as complete.

This table shows the list of supported application tasks and attributes based on which you can configure your completion criteria.

Application Task or Quick Action	Business Object	Attribute
Personal Details	Worker Name	Last Name
		First Name
		Title
		Worker Name Prefix
		Suffix
		Middle Name
		Honors
		Preferred Name
		Previous Last Name
		Worker Name Info1 through Worker Name Info30
Personal Details	Disability Info	Country
Personal Details	Ethnicity	Ethnicity
Personal Details	Demographic	Gender
		Highest Education Level
		Marital Status
Personal Details	Religion	Religion
Personal Details	National Identifiers	National Identifier Type
Personal Details	Biographical Info	Country of Birth
		Date of Birth

Application Task or Quick Action	Business Object	Attribute
Contact Info	Phone Details	Phone Type
Contact Info	Email Details	Worker Email Type
Contact Info	Address	Address Type
Family and Emergency Contacts	Worker Contact Relationship	Emergency Contact
		Primary Contact
		Relationship
Family and Emergency Contacts	Worker Contact Legislative Data	Gender
		Emergency Contact
		Primary Contact
		Relationship
Family and Emergency Contacts	Contacts	Date of Birth
		Emergency Contact
		Primary Contact
		Relationship
Family and Emergency Contacts	Worker Contact Name	Last Name
		First Name
		Title
		Worker Name Prefix
		Suffix
		Middle Name
		Honors
		Preferred Name
		Previous Last Name
		Worker Name Info1 through Worker Name Info30
		Emergency Contact
		Primary Contact
		Relationship

Application Task or Quick Action	Business Object	Attribute
Family and Emergency Contacts	Worker Contact Email	Worker Email Type
		Emergency Contact
		Primary Contact
		Relationship
Family and Emergency Contacts	Worker Contact Phone	Phone Type
Family and Emergency Contacts	Worker Contact Address	Address
		Emergency Contact
		Primary Contact
		Relationship
Identification Info	Citizenship	Citizenship
		Status
Identification Info	Passports	Issuing Country
		Type
Identification Info	Visas and Permits	Issuing Country
		Visa Permit Type
		Visa Permit Status
Identification Info	Drivers Licenses	Issuing Country
		License Type
		License Suspended
Payment Methods	Bank Accounts	Bank Account Type
Payment Methods	Payment Methods	Payment Amount Type
Document Records	Document Records	Document Type
		Issuing Country

This example procedure describes how you can configure the completion criteria to validate that a new hire in India has provided their home address before marking the journey task as complete.

Navigate to Task

1. On the application home page, click the **My Client Groups** tab.
2. Click **Show More** after the list of quick actions.

3. Click the **Checklist Templates** quick action in the Employment area.
4. Search and click the journey template, for example **Onboarding Journey India**.

   On the **Message** tab, ensure that the Processing Mode is set as **Alerts based notification**.
5. Click the **Tasks** tab. Add a completion criteria for the application task of type Contact Info, for example, **Review and update contact information**.

Configure Completion Criteria for Legal Employer Attribute

1. Click the **Add** icon in the Configure Completion Criteria section.
2. Select the **Address** business object.
3. Click the **Edit** icon for person criteria.
4. Click **Create Group**.
5. Specify values as indicated in this table. Where no value is indicated, use the default.

Field	Value
Attribute	Legal Employer
Operator	Equals
Ignore Case	Leave as is
Operand Type	Constant
Operand Value	Vision Corporation - India

6. Click **OK**.

Configure Completion Criteria for Address Type Attribute

1. Click the **Edit** icon for object criteria in the Configure Completion Criteria section.
2. Click **Create Group**.
3. Specify values as indicated in this table. Where no value is indicated, use the default.

Field	Value
Attribute	Address Type
Operator	Equals
Ignore Case	Leave as is
Operand Type	Constant
Operand Value	Home Address

4. Click **OK**.
5. Enter this text for the error message: **You need to provide your home address to complete this task.**
6. Click **Save and Close**.

7. The error message is displayed on the journeys task page when the new hire tries to mark the task as Done without providing their home address as part of the onboarding journey.

Translate Error Message

1. On the **Tasks** tab, click the **Confirm Personal Information** task.
2. If you want to translate the error message to another language than the base language, click the **Translation Editor** icon next to the **Error Message** field.
3. Enter the translated text for the error message in the preferred language field, and then click **OK**.

Points to Consider

- The Configure Completion Criteria feature doesn't automatically mark the journey task as complete, but only validates whether the required data is provided.
- You can configure the completion criteria only for responsive application tasks that are supported by the Configure Completion Criteria feature.
- The configuration is honored when you complete a journey task using REST API.
- The task completion criteria validation is applicable only when the user marks the task as Done. It's bypassed for other actions, such as marking the task as Not Applicable, or force completing the journey.
- The task completion criteria validation is bypassed when the task automatically expires.
- The task completion criteria validation is bypassed when you complete a journey task using HCM Data Loader.
- If there is more than 1 completion criteria on the same journey task and all of them have individual validation messages, only 1 validation message will be shown at a time.

For another example, see this topic: *How do I configure the completion criteria based on flexfields for a journey task?*

12 Embedded Application Task Type

Considerations for Using Embedded Application Task Type in Journeys

For the points to consider when you use the Embedded Application Task type, refer to this topic: *What are the considerations for using the Embedded Application Task type in journeys?*

Example of Embedding an Application Task Region in a Journey Task

You can reduce navigation and complete application tasks faster by using the task regions embedded within a journey task. You do this by configuring an Embedded Application Task and selecting the appropriate region.

Let's see an example procedure for configuring the Document Records task region in the Embedded Application Task for the Document Records task.

1. On the application home page, click the **My Client Groups** tab.
2. Click **Show More** under QUICK ACTIONS.
3. Click **Checklist Templates** in the Employment area.
4. Search and click the journey name for whose task you want to embed the task region.
5. Click the **Tasks** tab.
6. Click the **Upload your Document Records** task name for which you want to embed the task region.
7. On the **Details** tab, in the **Task Type** list, select **Embedded Application Task**.
8. In the **Embedded Application Task** field, select **Document Records**.
9. Click **Save and Close** two times.
10. Click **Done**.
11. Click the **Journeys** App on the home page.
12. On the **Explore** tab, search the click the journey name containing the Document Records task where you embedded the Document Records task region.
13. Click **Assign Journey** and assign the journey to a person.
14. Log in as the person to whom the journey is assigned.
15. Click the assigned journey and expand the **Upload your Document Records** task.
16. Enter the document record details on the journeys task page in the embedded region.
17. Click **Save**.
18. Mark the task as **Done**.

13 External URL Task Type

How You Configure the URL for an External URL Task Type in Journeys

There are two methods available to configure the URL for an external URL task type.

You can use either of these methods:

- Provide a static URL
- Register the link to an application using the Manage Integration of Additional Applications feature in Setup and Maintenance.

Provide a Static URL

Provide the URL to an external portal. Additionally, you can include optional parameters using the format parameter name={parameter value}

You can use any of these optional parameters in your URL:

1. TrustToken: This is the bearer token. The client can send this token in the Authorization header when making requests to protected REST resources.
2. AllocatedChecklistId: Unique identifier of the journey assigned to the person.
3. AllocatedTaskId: Unique identifier of the task within the journey assigned to the person.
4. PersonId: Person identifier of the person to whom the journey is assigned.

Use the prefix ? before the first optional parameter followed by '&' before additional parameters.

For example, the URL could be something like this:

```
https://www.oracle.com/sample.html?
attribute1={TrustToken}
&attribute2={AllocatedChecklistId}
&attribute3={AllocatedTaskId}
&attribute4={PersonId}
```

The data will be base64 encoded in the URL and needs to be decoded.

Open URL on Same Page

You can select the **Open URL on the same page** option when you configure the task. When you configure this option, you can access the external URL on the same journey page instead of a new browser window.

Here are a few points to consider:

- The configuration option is available when you add an External URL task in the Task library.
- The configuration option isn't available for guided journeys. The external URL in a guided journey task will open in a new browser window.
- The configuration option isn't available when you create an External URL task type using Add Task in Journeys. The external URL in a journey task will open in a new browser window.

- Use the browser back button to return to your journey task.

Use Application Integration Link

You can register the link to an external application and give it a user-friendly Application Name and specify the Full URL for the site that you can use in multiple external URL tasks.

1. In the Setup and Maintenance work area, click Manage Setup Content from the Tasks panel tab.
2. On the Manage Setup Content page, click Manage Integration of Additional Applications.
3. On the Manage Integration of Additional Applications page, click **Actions** and then **Create**.
4. Enter the application details in the relevant fields. Ensure that the information you provide is complete and accurate.
    - Begin the URL with `http://` or `https://`
    - The Full URL should contain the context root.

      For example, it should be `https://www.oracle.com/index` and not just `https://www.oracle.com`
5. Provide correct access credentials for the selected security policy.

   You can't edit the **Application Name** once you save the details.
6. Click **Save and Close**

You can use the **Application Name**, configured in the previous steps when configuring your External URL task type.

Use the following syntax for the URL `{application:<application_name>}`. For example, `{application:myOracleHome}` where `myOracleHome` is the configured application name.

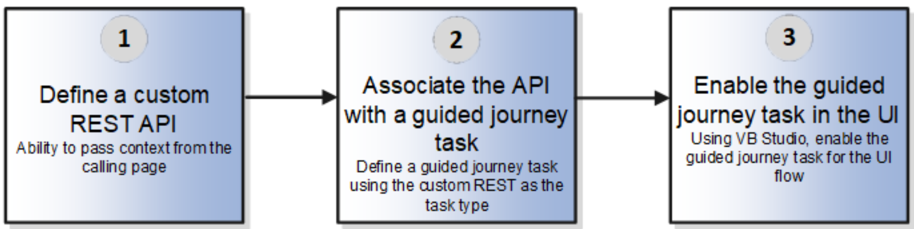
If you have multiple tasks pointing to the same external site, you can use the same syntax as the URL for those tasks. When there is a change to the external site address, you must update the **Full URL** for the required Application Integration. You don't need to update individual journey tasks.

14 User Defined Content Task Type

Configure User Defined Content Task Type for a Journey

After promoting one of her direct reports, Meg wants to do a salary change for them. You need to configure a guided task that uses market analysis data from a REST API of the user's choice.

You can do this by defining a custom REST API, associating it with the guided journey task that you configured, and enabling the guided journey task in the Journeys UI. Here's a diagram that illustrates the process:



Follow these steps to configure the guided task:

1. Configure the guided task. To do this, follow these steps:
   a. On the home page, click the **My Client Groups** tab.
   b. Click **Show More** under QUICK ACTIONS.
   c. Click the **Checklist Templates** quick action in the Employment area.
   d. In the Checklist Templates page, click the **Integrations** tab, and then click **Add**.
   e. Enter the values shown in this table:

Field	Value
Integration Category	Journey Task
Integration Type	User defined content
Integration Code	User-defined name for the integration, the name you enter here becomes available in the list of values when you configure the journey task.
Password	Enter the password to invoke your custom REST API.
Provider URL	Enter the URL to invoke your custom REST API.
Request Type	Get
Authentication Type	Select the appropriate authentication value for your custom REST API.
Request Payload	0
User Name	Enter the user name to invoke your custom REST API.

Field	Value
Enable integration and send information to external service provider	Select this option to enable checklist integration with an external service provider.

   f. Select the **Enable integration and send information to external service provider** check box.
2. Validate the integration. To do this, follow these steps:
   a. Click **Validate** to confirm that the integration works.
   b. Click **Save and Close**. The integration is successful if no errors are displayed.
3. Create a guided journey task and associate the journey integration you created. To associate the journey integration, follow these steps:
   a. Navigate to the Checklist Templates page.
   b. Click the journey name for whose task you want to associate the journey integration.
   c. Click the **Tasks** tab.
   d. Click the task name for which you want to associate the journey integration.
   e. On the **Details** tab, in the **Task Type** list, select **User Defined Content**.
   f. In the **Configuration** field, select the integration code you defined when configuring the journey integrations task.
   g. Click **Save and Close** two times.
   h. Click **Done**.
4. Associate the guided journey task to the Redwood page. For more information about enabling a guided journey for Redwood pages, see the topic in the Related Topics section.

For more information about the user defined content task type, see this resource on Customer Connect: User Defined Content Task Type in Guided Journeys (https://community.oracle.com/customerconnect/discussion/758365).

Related Topics

- Enable a Guided Journey for Redwood Pages

15 Report Task Type

How You Configure the Report Task Type in Journeys

The Report task action type in a journey enables task performers to view or download a BI Publisher report when performing the task.

For example, a Human Resources (HR) specialist can view all the data collected as part of the recruiting process or view the performance rating report during an exit interview.

Ensure you provide task performers access to the BI Publisher report, otherwise they can't view the report.

What to Include in the Report Path

This is what you can include in the report

- Specify the BI Publisher report folder path followed by the report name concatenated with a "/".
- Include optional parameters in the format parameter name={parameter value}.
- Use the prefix "?" before the first parameter followed by "&" before additional parameters.
- Remove the + character in the report path.

Here are journey specific parameters you can include in the report path:

Parameter Name	Parameter Value	What it Does
P_ALLOCATED_TASK_ID	`{AllocatedTaskId}`	Passes the ID of the assigned task to the report.
P_ALLOCATED_CHECKLIST_ID	`{AllocatedChecklistId}`	Passes the ID of the assigned journey to the report.

You need to pass only the parameter as stated in the table. The `PersonId` is implicitly passed based on the Allocated Task ID or the Allocated Checklist ID.

Let's say you specify this in the report path:`/Samples/SalaryReport.xdo?P_ALLOCATED_TASK_ID={AllocatedTaskId}`, the application passes the current assigned task's ID to the report as a parameter which the report can use to filter the results.

Alternatively, if you specify this in the report path:`/Samples/SalaryReport.xdo?P_ALLOCATED_CHECKLIST_ID={AllocatedChecklistId}`, the application passes the current assigned checklist ID to the report as a parameter which the report can use to filter the results.

You can also use both the parameters. For example, `/Samples/SalaryReport.xdo?P_ALLOCATED_CHECKLIST_ID={AllocatedChecklistId}&P_ALLOCATED_TASK_ID={AllocatedTaskId}`

If you don't specify any parameters then the default layout and output format are used to render the report. For example, if you specify this:`/Custom/Reports/ChecklistCompletionReport.xdo` the application runs the report with the default options and generates the output in PDF format. Only PDF report output format is supported. If the Document

Type is specified, the generated report is automatically created as a document record for that document type either in the task performer or journey assignee's Document Records based on how you have configured it.

For more information on OTBI reports, see the Oracle Human Capital Management Cloud Creating and Administering Analytics and Reports for HCM guide on the Oracle Help Center (https://docs.oracle.com/en/cloud/saas/index.html).

What to Include in the Report Path for Guided Journeys

Here's the parameter you need to include in the report path for a report task in a guided journey:

Parameter Name	Parameter Value	What it Does
P_PERSON_ID	`{PersonId}`	Passes the ID of the person for whom the page is opened.

You need to pass only the parameter as stated in the table. The PersonId is implicitly passed based on the Person ID of the person for whom the page is opened.

For example, a line manager wants to open the employment info for his employee. In this case, you specify the report path as follows: /Samples/EmploymentInfo.xdo?P_PERSON_ID={PersonId}. The application then passes the person ID of the employee to the report as a parameter.

The AllocatedTaskID and AllocatedChecklistID parameters are not applicable for the report task in guided journeys.

Open BIP Report on Same Assigned Journey Page

You can configure the option to open the BIP report for a Report task type in a panel drawer instead of a new browser window. To do this, follow these steps:

1. On the home page, click the **My Client Groups** tab.
2. Click **Show More** under QUICK ACTIONS.
3. Click the **Checklist Templates** quick action in the Employment area.
4. Click the journey name for whose task you want to open the BIP report on the same page.
5. Click the **Tasks** tab.
6. Click the task name for which you want to open the BIP report on the same page.
7. On the Details tab, select the **Open report on same tab as task** check box.
8. Click **Save and Close** two times.
9. Click **Done**.

This option isn't available for guided journeys and the BIP report in a guided journey task will continue to open in a new browser window.

16 Analytics Task Type

How You Configure Analytics Task Type in Journeys

For more information, refer to this topic: *How do I configure the Analytics task type in journeys?*

17 Agent Task Type

Configure Agent Task Type in Journeys

The Agent task type in guided journeys uses Oracle Artificial Intelligence (Oracle AI). You can use this task type to allow employees to directly interact with the AI platform.

For example, managers can type a question to find the process to onboard new hires in their organization.

Consider this example. As part of the process for onboarding new hires, Ravi wants to find answers for the questions he has related to employee onboarding. To help Ravi, you need to create a tool and agent for the onboarding process and associate the agent with the tool that contains the data to be searched by the agent. The tool contains the documents with the questions and answers related to the process being carried out by the agent. In this case, since it's an onboarding agent, the tool that you select needs to be related to the onboarding process so that the agent can search and respond with the correct answers. Lastly, you enable the guided journey task in the Journeys UI.

Before You Start

- Configure the tool.
- Configure the agent.

  For more information about the configuration, refer to the *How do I set up AI Agents for Redwood pages?* playbook.

Enable Agent Task in Journey Redwood Page

1. Associate the agent that you created with the Agent type task that you create in your guided journey. To do this, follow these steps:
   a. Navigate to the home page and click the **My Client Groups** tab.
   b. Click **Show More** under Quick Actions.
   c. Click the **Guided Journey** quick action in the Journeys Setup area.
   d. Search and select the guided journey where you want to create the Agent type task.
   e. On the Overview tab, navigate to the **Tasks** section.
   f. Click **Add** and enter the values shown in this table. For other fields, use default values.

Field	Value
Task Name	Onboarding Advisor
Task Description	Optional
Add instructions for this task	Optional
Task Type	Agent
Configuration	Onboarding Agent

g. Click **Save**.

2. Associate the guided journey Agent task with the Redwood page. For more information about enabling a guided journey for Redwood pages, see the topic in the Related Topics section.

When you run the Onboarding Advisor task in the Redwood page, you can type your onboarding questions in the agent search box. For example, you can type **What is the medical insurance coverage in India?** and press ENTER to view the answers. You can continue any further questions in the answer window. Click **Sources** to view the document from where the answers are obtained.

Points to Consider

- You can use the Agent task type only in a guided journey.
- You can associate different AI agents with different journey tasks. For example, you can associate a Promotion Agent with a promote journey task and a Benefits Agent with a benefits journey task. You can also reuse the same agent for multiple journey tasks. For example, a Knowledge Transfer Agent can be associated with a promotion journey, transfer journey, or an offboarding journey.
- The Agent task type is only available when using guided journeys on Redwood pages.
- The interaction with the agent is only displayed on the UI and not stored anywhere.
- The Agent task type can't be created in the task library or in a task group.
- The AI Agent can't reference documents in the journey template. It can only reference the documents that you upload when you configure the tool.

Related Topics

- Enable a Guided Journey for Redwood Pages

18 Electronic Signature Task Types

Configure Native Electronic Signature in Journeys

You create a task of type Electronic Signature so that employees' can read and electronically sign a document. You want the signed document to be available in the employees' document records for future reference.

You make use of the enhanced capability in the native electronic signature journey task to configure a name and password validation pattern to suit business requirements. Employees can use their display name, full name, or last name to electronically sign the document based on the configured name validation. The name is validated against the value of the name in the person record.

Before You Start

- Create Employment Agreement as the Document Type using the Document Types task. The signed document is created as an attachment to a document record for this document type.
- It's mandatory to configure these attributes as Relevant for the document type - Document Name and Issued On. And it's mandatory to configure all other document type attributes as Not Required.
- Set Restrict Update to Yes in Document Record Preferences. By default, Restrict Delete is also set to Yes.
- Create a Business Intelligence (BI) Publisher template for the document that needs to be electronically signed.

Create Data Model

1. Navigate to Tools **>** Reports and Analytics **>** Browse Catalog **>** New **>** Data Model **>** + icon > SQL Query.
2. Enter a name, select the data source as ApplicationDB_HCM and Type of SQL as Standard SQL.
3. Enter the SQL query and click **OK**.

   If you want to display the physical signature in the signed document, include the ESIGN_SIGNATURE column as part of your SQL query.
4. Click **Parameters**, click the + icon, and enter these supported parameters:

Name	Data Type	Default Value
P_ALLOCATED_TASK_ID	String	Allocated Task Identifier
P_ALLOCATED_CHECKLIST_ID	String	Allocated Journey Identifier
P_PERSON_ID	String	Person Identifier
P_SIGNER_NAME	String	Name of the person signing the document
P_SIGNER_EMAIL	String	Email of the person signing the document
P_SIGN_DATE	String	Date when the document is signed
P_SIGNER_ADDRESS	String	IP Address of the person signing the document

> **Note:** Don't reference the P_SIGN_DATE, P_SIGNER_NAME, P_SIGNER_EMAIL, and P_SIGNER_ADDRESS parameters in the WHERE clause of the data model. This is because the parameter values remain blank at run time and are populated only after the task is marked as complete. If the parameter values are required in the report, use the report parameters instead of fetching them from the query.

5. Click **View Data** and click **Save as Sample Data**.
6. Save the data model and make a note of the name.

Create RTF Template and Associate with Data Model

1. Navigate to **Tools > Reports and Analytics > Browse Catalog > New > Report**.
2. Click **Cancel** in the **Create Report** dialog box and click **OK**.

> **Note:** To display the physical signature as an image in the signed document, you need to configure the ESIGN_SIGNATURE field in the RTF template. For example, you can add this sample code in the **Advanced** tab of the **Oracle Analytics Publisher Properties** dialog box:
>
> ```
> <fo:instream-foreign-object content-type="image/jpeg" height="65px" width="200px"><?
> ESIGN_SIGNATURE?></fo:instream-foreign-object>
> ```

3. Click the search icon adjacent to Data Model and select the data model created in the previous procedure.
4. In the Upload or Generate Layout section, click **Upload**. Enter the layout name, select the template file (sample file at the end), Type = RTF Template, Locale = English. Click **Upload**.
5. Save the report.
6. Click **View Report** to review if the layout is correct.
7. Make a note of the report path, as that needs to be configured as part of the electronic signature task configuration.

Configure Electronic Signature Validation

1. Go to **My Client Groups > Journeys Setup > Journey Integrations**.
2. On the Configure Journey Integration page, click **Add**.
3. Enter sample values as indicated in this table. For others if not specified, use the default values.

Field	Sample Value
Category	Electronic signature validation
Type	Native electronic signature
Code	This is a user-defined name for this integration and used during the native electronic signature task setup.
E-Signature Validation Type	Name and password. Based on the selected option, those attributes will be mandatory on the task page.
Name Validation	Full name

Field	Sample Value
Country	United States
National Identifier Type	Social Security Number
Display signature pad	Yes
Password Validation Pattern	FFF111DDMMYY This requires you to enter the password in this format: ◦ F represents the first few letters from your first name, for example, if the pattern specified is FFF and your first name is Marshal, enter Mar. ◦ 1 represents the first few characters of your national identifier type, for example, if the pattern specified is 111 enter A12 from your national identifier A12B7645. ◦ DD represents the day in your date of birth, for example, enter 05 if your date of birth is October 05, 1970. ◦ MM represents the month in your date of birth, for example, enter 10 if your date of birth is October 05, 1970. ◦ YY or YYYY represents the year in your date of birth, for example, enter either 70 or 1970 if your date of birth is October 05, 1970.
Display email	No
Enable E-Signature Validation	Checked

4. Click **Validate** to confirm the configuration details.

   Here are a few points to consider:
   - The password instruction text on the task page will be displayed based on the password validation pattern configured.
   - If an attribute that's configured in the password validation pattern is not present in the user’s record, it will prevent them from completing the task.
   - Only the name value is validated against the display name stored in the application.
   - Name and Date Signed, Password and IP address of the user are always stored in the journey table when using this task type.
   - However, the IP address of the user signing the document is hidden on Allocate Checklists and Journeys pages to protect the confidentiality of the electronically signed document.
   - If you reopen or remove a journey task that had a document record associated to it, that document record is deleted. It isn't available on the reopened task.
   - Email ID is also stored in the same table, if provided by the user when completing this task.
   - You can't have multiple signatories for a native electronic signature task. However, you can configure multiple native electronic signature journey tasks dependent on each other with the required signatories or performers. Then, you can build your custom electronic signature BIP report so that it progressively includes electronic signature details from previously completed tasks. For more information, see *Capturing Multiple E-Signatures with Oracle HCM Journeys*

Create Task of Type Electronic Signature

1. Navigate to **My Client Groups > Journeys Setup > Journey Templates**.
2. Click **Create** and select the creation method.
3. Enter the details for the journey template and click **Create Draft**.
4. In the Tasks section, click **Add > New Task** and enter details for the task as detailed here. For other fields, use the default values:

Field	Values
Task Name	Read and Sign Agreement
Task Description	Optional
Status	Active
Sequence	Retain default value
Make this task mandatory	Yes
Performer	Worker
Owner	Area of responsibility
Owner Responsibility Type	HR representative
Task Type	Electronic Signature
Signature Type	Electronic Signature - Native
E-Signature Validation Type	Optionally, select the Validation Type you configured in the previous step.
Report Path	`/Custom/Human Capital Management/Onboarding/EsignDocumentReport.xdo?P_SIGN_DATE={SignDate} &P_SIGNER_NAME={SignerName}&P_SIGNER_EMAIL={SignerEmail}&P_ALLOCATED_TASK_ID={AllocatedTaskId}&_xf=pdf` If you specify the report path, then the document type is mandatory. Also, only PDF format is supported.
Document Type	Employment Agreement
Documents Are For	Performer
Open report on same tab as task	Checked
When does the task expire?	After assigned date
After how many days?	7

5. Click **Save**.

When you assign this task to new hires, they can go to the task page, read the document and electronically sign it. The task can be set to complete only when they enter their name. The name the worker enters is validated against the full name stored in the application. The password entered by the worker is validated against the specified password validation pattern. Once that's done, the signed document becomes available as a document record in the specified document type. The electronically signed document is stored as an attachment in PDF format in the worker's Document Records under the specified document type.

This is what happens when the worker clicks See Document:

- The document to be signed opens in a panel drawer on the same page.
- If details haven't been entered, it displays the BIP template and the unsigned document to the employee.
- If details have been entered, it displays the BIP template and the signed document with the signature details which are merged (including date and time).
- Even if See Document isn't clicked, the signed document is still moved to Document Records when the task is marked complete. After the worker signs the document, See Document is disabled.

For more information about BI Publisher reports, see the Analyses, Reports, and Dashboard Modification chapter in the Oracle Human Capital Management Cloud Administering Analytics and Reports for HCM guide.

Enable Physical Signature for Native Electronic Signature

You can provide your physical signature when using a journey task of type Electronic Signature – Native and save the signed document as a document record.

Follow these steps to enable the physical signature for the native electronic signature task:

1. Go to **My Client Groups > Journeys Setup > Journey Integrations**.
2. On the Configure Journey Integration page, click **Add**.
3. Select **Electronic signature validation** for the integration category and **Native electronic signature** for the integration type.
4. Enter the integration code, e-signature validation type, and other details.
5. Select **Yes** in the **Display signature pad** field. The default value is **No**.
6. Select the **Enable E-Signature Validation** check box.
7. Click **Validate** and click **Save**.
8. Navigate to the Journey Templates page.
9. Select the journey that contains the task for which the user needs to provide the physical signature.
10. In the Tasks section, click the **Edit** icon for the task name for which the user needs to provide the physical signature.
11. Select **Electronic Signature - Native** for the signature type and select the validation type that you entered while configuring the integration in step 4.
12. Enter the report details and select the **Open report on same tab as task** check box.

When the task is assigned, the user will see the signature pad where they can physically sign the document. The physical signature isn’t stored as part of the journey task and is only displayed in the PDF version of the document.

Users have to electronically sign on the signature pad in a Native eSignature task to mark the task as done. The Done button is enabled only when the user signs on the signature pad. To make the signature pad as a required field, refer to this topic: *How do I make the signature pad mandatory for a native eSignature task?*

You can't use the signature pad to include multiple physical signatures within the same document because the physical signature isn't stored in any database table. The signature from the signature pad is directly added to the signed PDF document, and not stored anywhere thereafter.

How Signed Document Data is Stored in Document Records in Journeys

When a user signs a document, the document is stored in Document Records. The details of the attributes populated in Document Records is shown in this table:

Attribute	In Document Records	Example	Comments
Document Type	Selected in Journey Task	Employment agreement	As set up in Document Types FSM task.
Document Code	Auto-generated as a concatenation of: • Task Name • Timestamp in yyyy-mm-dd-hh24-mi-ss format that is date along with hours (24-hour format,minutes and seconds) of database date and time	Read and sign the document_2023-09-16 -17- 33-11	This will be unique for each document.
Document Name	Journey task name	Read and sign the document	If the title is longer than the character limit, then the name is truncated accordingly.
From Date	Date when this task was marked as complete	16-Sep-2023	Provides the ability to track when the document record was created.

Configuration Options for Electronic Signature Task in Journeys

This table summarizes the different configuration options for an electronic signature task type and the effects of the configuration.

	Electronic Signature - Basic	Electronic Signature - Advanced
Report Path Specified	No	Yes
Document Type Specified	No	Yes
Document Record Created	No	Yes
Task Interaction Details	• See Document isn't available, since there's no associated report template.	• See Document displays the report with either the signature details populated or

	Electronic Signature - Basic	Electronic Signature - Advanced
	• Basic electronic signature details (name, email, and date signed) are stored in the database and displayed on the completed task page. • Since there's no document generated, there's no document record created.	unpopulated based on the data entered by task performer. • Basic electronic signature details (name, email, and date signed) and IP address of signer are stored in the database and displayed on the completed task page. • Once the task is completed, the signed document is available in Document Records against the document type specified in the task setup.

Configure Electronic Signature Using DocuSign in Journeys

You use the DocuSign signature type so that new hires can electronically sign the document during onboarding. DocuSign is your third-party service provider who manages electronic signatures.

Before You Start

1. Register and obtain a license from DocuSign. Note that this is a one-time activity.
2. Note down the account key and provider URL from the DocuSign site.
3. If you enable the ORA_PER_CHECKLIST_DEFER_DOCUSIGN_CREATION profile option (set the profile value to Y), you can defer the creation of the document to be signed in DocuSign until the time the performer initiates the DocuSign journey task.
4. If you enable the ORA_PER_CHECKLIST_USE_OAUTH_IN_DOCUSIGN profile option, you only need to enter the User ID provided by DocuSign instead of the User Name and Password. If you haven't enabled this profile option, note down and enter the user name and password from the DocuSign site.

   Here are some points to note:
   - The account ID is available under Admin > Account > Billing and Usage > Plan.
   - Provider URL is dependent based on whether it is a staging or production environment. For example, https://demo.docusign.net is the profile value to be set to connect to the demo or stage DocuSign environments.
   - User name and password are available under Admin > Users and Groups > User.
5. Ensure the ORA_PER_CHECKLIST_USE_PRODUCTION_OAUTH_DOCUSIGN profile option is set to Y in your production environment. After providing the User ID you obtain from DocuSign, you need to authorize and validate the authentication. This is a one-time activity.
6. As per DocuSign, all authentication methods other than OAuth 2.0 won't be supported after September 2022. Hence, it's recommended that you plan and migrate from the legacy authentication by enabling the profile options, latest by 22C.

Create Template and Upload to DocuSign

1. In DocuSign, enter the basic template details such as Name and Description.
2. Upload the document (DocuSign supports many document formats) to the Envelope.

3. In the Add Recipients to the Envelope section, enter the role name ORA_ESIGN_CHECKLIST in the Recipient field to make it applicable to journeys (i.e. this is required for the document to be recognized in Oracle Cloud HCM as a document to be used in Journeys or Onboarding). Optionally, you can add a message to this template.
4. Click **Next**.
5. Include standard fields such as Full Name, Email, and Date Signed by dragging and dropping them on the document (that are supported in HCM) in the document as per your requirement.
6. Enter the custom fields for Company and Title (mapped to Legal Employer and Assignment Name respectively in HCM) as ORA_LEGAL_ENTITY and ORA_JOB_TITLE respectively. Optionally, you can add a text box with custom text or checkbox and other standard fields that DocuSign offers in the document. However, note that there aren't any delivered mapping to fields in HCM.
7. Click **Recipient Preview** to see how this document will appear to the end-user (on desktop, tablet, or mobile device).
8. Click **Save and Close.**
9. Note the template ID that is generated by navigating to the document template and clicking the Info (i) icon next to the document name.

Configuring the Manage Electronic Signature Task

1. Go to **My Client Groups > Journeys Setup > Electronic Signature Configurations**.
2. If you set the ORA_PER_CHECKLIST_USE_PRODUCTION_OAUTH_DOCUSIGN profile option Y in your production environment, then these are the fields that display. Enter the details provided by DocuSign.

Field	Value
Module	Checklist
Account Key	Obtained from DocuSign
User Name	Obtained from DocuSign
Password	Obtained from DocuSign that you retained or reset.
Provider URL	URL of the DocuSign production or demo server.

3. Click **Save**.

Configure Task Action Type

1. Go to **My Client Groups > Journeys Setup > Journey Templates**.
2. Click **Create** and select the creation method.
3. Enter the details for the journey template and click **Create Draft**.
4. In the Tasks section, click **Add > New Task** and enter details for the task.
5. Select Electronic Signature as the Task Type and **Electronic Signature - DocuSign** as the Signature Type.
6. Enter the template ID that you obtained from the DocuSign site.
7. Click **Save**.

Here's what happens when you assign this task to new hires. They are automatically taken to the DocuSign site where they can read and electronically sign the document.

The signed document is saved and stored on the DocuSign site. It isn't available in HCM Cloud.

Make sure that the email address in the person's record is set as Primary.

Attributes Sent from HCM to DocuSign

These are the attributes sent from HCM to DocuSign:

- Full Name: Name of the task performer signing the document.
- Email: Email address of the task performer signing the document.
- Date: Signed Date the signature is being provided.
- Company (ORA_LEGAL_ENTITY): Legal Employer of the task performer signing the document.
- Title (ORA_JOB_TITLE): Assignment Name of the task performer signing the document.

Considerations for Configuring DocuSign Envelopes in Journeys

When using an integration of Journeys with DocuSign, every journey task that requires DocuSign electronic signature generates a corresponding envelope.

It’s not recommended or feasible to combine and use a single envelope for all the DocuSign journey tasks for a performer due to these considerations.

- You configure multiple tasks in a journey; some of them may be related to providing an electronic signature using DocuSign.
- You configure tasks to appear in different phases of an Enterprise Onboarding journey. This controls the tasks available to the performer based on where they are in their enterprise onboarding phase.
- You configure dependencies between tasks. For example, electronic signature of an employment agreement can happen only after the performer completes the task of providing their personal information. An electronic signature of a non-disclosure agreement can happen only after the I-9 verification. This controls the order and timing of when the user can complete a specific task.

If a single envelope is generated for all the electronic signature tasks, then this is what happens:

- When the user goes to DocuSign to sign the first such document, they will be able to see all the other electronic signature documents also as part of that single envelope. This overrides the configuration of different electronic signature tasks in different phases of enterprise onboarding or having dependencies between journey tasks.
- When the user provides the electronic signature in DocuSign for even one document in that single envelope, the entire envelope is closed. This means the user will be unable to return to DocuSign and provide their electronic signature for the other documents, which are part of that single envelope.

How You Decide Whether to Use Native eSignature or DocuSign in Journeys

This table shows the comparison between Native eSignature and DocuSign.

Criteria	Native eSignature	DocuSign
Is this included as part of my base service?	This signature type is native to the application and works with Journeys. This functionality gives you the capability to electronically sign a document and transfer the signed document to the worker's document records in Cloud HCM.	DocuSign is a third-party service provider that manages electronic signatures. This signature type allows new hires to electronically sign documents during onboarding using Journeys.
What's the user experience?	Users need to click the **See Document** link on the task page to read the document to be signed. They can provide their signing details, such as name and email address on the task page to complete the task. Once the user enters the data, the **See Document** link will invoke the associated BIP template, merge the signature details and display the signed document to the user.	Users need to navigate from the task page to the DocuSign site where they can read and electronically sign the document. The user needs to return to the Cloud HCM journey task page to mark the task as Complete.
What attributes are stored?	The Name, Date Signed, and IP address of the user are always stored in the checklist table when using this task type. The Email ID is also stored in the same table, if provided by the user when completing the task. The signing details are stored in the PER_ALLOCATED_TASKS table.	The document to be signed can be configured to include standard fields, such as Full Name, Email, and Date Signed. This includes custom fields for Company and Title that are mapped to the legal employer and assignment name respectively in Cloud HCM.
Is the signed document stored in document records?	Yes. A document record of the specified document type is created once the task is marked as complete. The signed document is stored as an attachment in PDF format in the document records for the specified document type.	No. The signed document is saved and stored on DocuSign. It is not available in the document records in Cloud HCM.
Can I include HCM attributes in the signed document?	Yes, you can include HCM attributes as part of your custom BI report.	No, you can't. Only these 4 attributes are available: Full Name, Email, Legal Employer, and Job Title.

19 Configurable Forms

How You Create Configurable Forms in Journeys

Use the Checklist Descriptive Flexfield task in the Setup and Maintenance work area to create a descriptive flexfield for use in a Configurable Form task.

Create a context within the descriptive flexfield representing the name of the form, for example, Onboarding Feedback. Create context specific segments and values to define the questions and responses respectively. When users create a task with the Configurable Form type, they can see the Onboarding Feedback option in the Configurable Form drop-down list and select it.

These points apply to the data collected from a configurable form:

- Data is specific to the Descriptive Flexfield Context. If you require that multiple configurable forms use the same data, you must create a configurable form with a global DFF context.
- Data is available only within the configurable form. You can create a custom BI report to fetch that data for display.

Define Journey Descriptive Flexfield Context and Segments

Use the Checklist Descriptive Flexfields task in Setup and Maintenance and select the PER_PERSON_ALLOCATED_TASKS_DFF to specify the context, context sensitive segment, and the values required to display at run time.

Activate Journey Descriptive Flexfields

Activate the descriptive flexfield after you define the context and context sensitive segment values by deploying the flexfield. You must sign out and sign in to the application to see your descriptive flexfield.

Associate the Task Action Type to the Journey Descriptive Flexfield

If the Task Type is Configurable Form, the form created using the journey descriptive flexfield displays in the Configurable Form drop-down list when creating the task. At run time, the form appears as part of a task that workers need to complete.

Example of Creating a Configurable Form in Journeys

You want to create an onboarding satisfaction survey and add it as one of the tasks in a new hire journey.

You create the survey as a context in the journey descriptive flexfield and associate the survey with the task by setting the the task action type to Configurable Form.

Summary of Tasks

1. Create the context for the descriptive flexfield and add three context sensitive segments.
2. Deploy the flexfield.
3. Associate the descriptive flexfield with the task.

Creating the Descriptive Flexfield

1. In the Setup and Maintenance work area, go to the following:
   - Functional Area: Workforce Information
   - Task: Checklist Descriptive Flexfields
2. On the Manage Checklist Descriptive Flexfields page, select PER_PERSON_ALLOCATED_TASKS_DFF and click Edit.
3. Click **Manage Contexts**.
4. In the Create Context section, enter values listed in the following table:

Field	Value
Display Name	Onboarding Survey
Description	Onboarding feedback survey
Context Code	Auto-populated but can be modified
API Name	Auto-populated but can be modified
Enabled	Checked

5. Click **Save**.
6. In the Context Sensitive Segment section, enter the values listed in the following table:

Field	Values for Segment 1	Values for Segment 2	Values for Segment 3
Display Name	I found the Orientation program interesting and interactive.	What is your overall impression of your first few days?	Overall rating of your onboarding experience.
Description	I found the Orientation program interesting and interactive.	What is your overall impression of your first few days?	Overall rating of your onboarding experience.
Context Code	Auto-populated but can be modified	Auto-populated but can be modified	Auto-populated but can be modified

Field	Values for Segment 1	Values for Segment 2	Values for Segment 3
API Name	Auto-populated but can be modified	Auto-populated but can be modified	Auto-populated but can be modified
Enabled	Checked	Checked	Checked
Data Type	Character	Character	Number
Table Column	ATTRIBUTE1	ATTRIBUTE2	ATTRIBUTE_NUMBER2
Value Set	PER_YES_NO	50 Characters	1 Number with No validation
Prompt	I found the Orientation program interesting and interactive.	What is your overall impression of your first few days?	Overall rating of your Onboarding experience.
Display Type	List of Values	Text Box	Text Box
BI Enabled	Checked	Checked	Checked

7. Click on **Save and Close** till you return to the Checklist Descriptive Flexfields page.
8. Click **Deploy Flexfield**.
9. Click **OK** and then **Done**.

Deploying the Flexfield

Deploy the flexfield that you created to make it available in the Tasks page.

1. On the Checklist Descriptive Flexfield page, click **Deploy Flexfield**.
2. In the Confirmation dialog box, click **OK**, and click **Done**.

You must sign out and sign in before you can see the changes you deployed at run time. The flexfield context and the associated segments automatically appear when you select the Configurable Form action type in the Create Task page.

Associating the Descriptive Flexfield with a Task

1. In the Setup and Maintenance work area, go to the following:
   - Functional Area: Workforce Information
   - Task: Checklist Template
2. On the Checklist Template page, click **Create**.
3. Enter General journey details and click **Save**.
4. Click the **Tasks** tab.
5. Click **Add** and then enter the details of the task.
6. Select **Configurable Form** as the task type.

7. Select the descriptive flexfield context Onboarding Survey from the **Configurable Form** drop-down list.
8. Complete details in other tabs.
9. Click **Save and Close**.

Journey Descriptive Flexfields

You use the Checklist Descriptive Flexfields task in the Setup and Maintenance work area to create and manage journey related flexfields. Review these journey descriptive flexfields, and use them as appropriate to suit your requirements.

Here's the list of journey descriptive flexfields in the application:

Application Table Name	Descriptive Flexfield Code	Name	Used	Availability
PER_ALLOCATED_TASKS	PER_PERSON_ ALLOCATED_TASKS_DFF	Person Allocated Task Attributes	For creating journey task of the type Configurable Form.	Available for use.
PER_ALLOCATED_ CHECKLISTS	PER_ALLOCATED CHECKLISTS_DFF	Person Allocated Checklist Attributes	For person assigned journey attributes.	Not available for use.
PER_CHECKLISTS_B	PER_CHECKLISTS_DFF	Checklist Attributes	For journey attributes.	Not available for use.
PER_TASKS_IN_ CHECKLIST_B	PER_TASKS_IN_ CHECKLIST_DFF	Checklist Task Attributes	For journey task.	Not available for use.

Parameters for Journey Descriptive Flexfields

This table shows the parameters that you can use in the assigned tasks DFF (PER_PERSON_ALLOCATED_TASKS_DFF):

Parameter Name	Parameter Description	Data Type
ACTION_TYPE	Action type	Varchar2
ACTUAL_END_DATE	Actual end date	Date
ACTUAL_START_DATE	Actual start date	Date
ALLOCATED_CHECKLIST_ID	Allocated checklist identifier	Number
ALLOCATED_TASK_ID	Allocated task identifier	Number
RESPONSIBILITY_TYPE	Responsibility type	Varchar2

Parameter Name	Parameter Description	Data Type
STATUS	Status	Varchar2
TARGET_END_DATE	Target end date	Date
TARGET_START_DATE	Target start date	Date
TASK_IN_CHECKLIST_ID	Task identifier	Number

Only ALLOCATED_CHECKLIST_ID and ALLOCATED_TASK_ID are supported in Journeys.

Example

This example illustrates how to use flexfield parameters to create a value set for an assigned journey task flexfield segment. It shows how you can use descriptive flexfields (DFF) to get the legal employer details of the person to whom a journey task is assigned.

1. Use the Checklist Descriptive Flexfields task to define the DFF (PER_PERSON_ALLOCATED_TASKS_DFF)
2. Define the value set to be used in the DFF. Use syntax as indicated in this sample:

```
FROM Clause: PER_ALLOCATED_CHECKLISTS C, PER_PERIODS_OF_SERVICE S, PER_LEGAL_EMPLOYERS L
Value Expression: L.NAME
WHERE Clause: C.ALLOCATED_CHECKLIST_ID = :{PARAMETER.ALLOCATED_CHECKLIST_ID} AND
C.PERSON_ID = S.PERSON_ID AND
S.PERIOD_TYPE = 'E' AND
S.PRIMARY_FLAG = 'Y'
AND S.LEGAL_ENTITY_ID = L.ORGANIZATION_ID
AND L.STATUS = 'A'
```

3. Save and deploy the DFF.
4. Sign in as an employee and view the assigned journey task. The legal employer appears in the list.

20 Advanced Task Type

How You Create an Advanced Task in Journeys

The Advanced task type enables you to combine a maximum of 3 task types in a single task instead of creating separate tasks.

For example, you can combine a video, questionnaire, and e-signature task if you want a new hire to watch a video, answer a questionnaire, and electronically sign an agreement as part of their onboarding.

How You Combine Task Types

Determine which task types you need and select the check box next to each of the task types listed in the Create Tasks page. The order of the task types in the setup page and in an assigned task is the same. You can't change this order:

- Document
- External URL
- Application Task
- Video
- Embedded Learning
- Questionnaire
- Configurable Form
- Electronic Signature
- Report

If you enable Comments and Attachments, it appears after the last task in an assigned task. When you create an advanced task you can add it to your task library or add it from the task library to an assigned journey.

What Happens When Tasks are Combined

You can't have different owners and performers for each of the tasks in an advanced task. You can have only a single owner or performer for the entire combined task. Not only that, some of the actions or sections are common when you combine the task types. Here's a list of the common actions and sections:

- Rename Action labels section in Display Properties. All action labels for all the task types being combined are listed.
- Done, Not Applicable, and so on.
- Comments and Attachments
- Notes Header and Notes section. Anything you want to add for all the sub-tasks needs to be part of the single notes section that appears right on top of the advanced task.
- Contact info section

Points to Consider

- You can’t create an advanced task from the Journeys app.
- You can’t use an advanced task in Guided Journeys.
- The DocuSign, I-9, and OPA task types aren’t supported in an advanced task.
- You can't use the same task type as a combination, the task types need to be distinct. For example, you can create an advanced task by combining the Document and External URL task types. However, you can't combine two External URLs.
- If you use Electronic Signature as one of the tasks when configuring an advanced task, then you must configure Electronic Signature Validation by using the **Checklist Integrations** Functional Setup Manager (FSM) task.
- An advanced task type is supported as part of a journey template in the following operations:
  - When you export and import a single journey template.
  - When you use FSM to export and import journey configuration.
  - When you duplicate a journey template.
  - When you add tasks from the task library.
  - When you add tasks to the task library.
  - When you use HCM Data Loader (HDL).
- Consider the following scenario. You have created an advanced task using the following task types:
  - Questionnaire or Configurable Form
  - Electronic Signature or Report

  In this scenario, you can’t include the responses for the questionnaire or configurable form in the electronic signature document or report of the same advanced task. This is because the responses are not saved in the database until the advanced task is marked complete.

Create an Advanced Task in Journeys

You want to combine a video, questionnaire, and an e-signature task in a single task to include in an onboarding journey template.

You create an advanced task with these 3 task types and add them to the onboarding journey template for new hires in your organization.

Before You Start

- Create an onboarding journey template.
- Define a questionnaire with questions related to the onboarding process.
- Create a video on the organization’s work culture.

Create Task: Complete Your Onboarding Journey

1. In the Setup and Maintenance work area, go to the Checklist Templates task.

2. Search for and open the onboarding journey you created.
3. Click the **Tasks** tab.
4. Click **Add** and enter details as detailed here. For other fields, use default values.

Field	Values
Name	Complete Your Onboarding Journey
Status	Active
Description	Watch the video, complete the questionnaire, and sign the confidentiality agreement.
Task Type	Advanced
Video	Selected
Video Type	Embedded URL
URL	`https://www.youtube.com/embed/tsl5Zsbk8VQ`
Questionnaire	Onboarding questionnaire
Electronic Signature	Selected
Signature Type	Electronic Signature – Native
Validation Type	DisplayNameOnly

5. Click **OK**.

21 I-9 Task Type

Example of Integrating Journeys with HireRight for I-9 Employment Eligibility Verification

The delivered I-9 integration with HireRight does these things:

- Automatically creates a HireRight Document from Cloud HCM by sending the required information from Cloud HCM to the vendor HireRight when the journey is assigned to the worker or when the worker accesses Section-1 task.
- Provides a specific task for the worker in Cloud HCM to navigate to the HireRight portal to complete Section-1.
- Eliminates the need for the user to explicitly log in to HireRight when accessed from Cloud HCM.
- Provides a specific task for the manager or HR in Cloud HCM to navigate to the HireRight portal to complete Section-2.
- Provides the ability to automatically mark the I-9 task as Done.
- Provides the ability to automatically update the I-9 status in the work relationship in Cloud HCM.
- Provides the ability to bring the completed I-9 back to Cloud HCM and store it in Document Records.

In this example, you configure the settings that will enable your organization Oracle, USA to integrate with HireRight, a third-party I-9 form verification service provider.

Since I-9 form verification is mandatory for employees in the USA, this integration will enable you to include an I-9 verification task in new hire journeys for USA based workers.

Before You Start

- Obtain a license and register with HireRight. This is a one-time activity.
- Note down the account code obtained from HireRight.

Points to Consider

- All I-9 tasks in the same journey should use the same HireRight integration account.
- When configuring I-9 integration, you need to use the primary email address of the employee. Although the default email type is Work Email, you can change that in the Employee Email Type field. Whichever email you use, you must ensure that the worker retains the same email until the time the I-9 process is completed. That is, if you specify Home Email as the I-9 email, the worker should also have Home Email and this should not change when the I-9 process is in progress.
- An I-9 document is created in HireRight when the journey is assigned. You need to ensure that the value of the ORA_PER_CHECKLIST_DEFER_I9_CREATION profile option is set to Y. This will enable the creation of the I-9 document in HireRight only when the employee accesses the task.
- If you use I-9 in an enterprise onboarding category journey, all the I-9 tasks should be configured within the same enterprise onboarding step category journey template.

- The Person ID from Cloud HCM is sent to HireRight as the Client Applicant ID, and the Allocated Checklist ID is sent as Client Request ID. A combination of Client Applicant ID and Client Request ID is a unique identifier for the I-9 document in HireRight.

Configure the Journey Integrations Task

1. In the Setup and Maintenance work area, go to Checklist Integrations task.
2. On the Checklist Integrations page, click **Add**.
3. Enter the values as shown in this table. Note that some values are provided by HireRight. For others if not specified, use the default values.

Field	Values
Integration Category	I-9
Integration Type	HireRight
Integration Code	User-defined name for the integration, the code you enter here becomes available in the list of values when you configure the I-9 task.
Administrator User Reference	A valid user account in HireRight with administrator privileges to initiate the I-9 process, generate the employee web link, and check the verification status. You need to obtain this value from HireRight.
Web Service URL	Override the application defaulted URL with `https://api2.hireright.com:443/ws_gateway/HireRightAPI/v/1/2`
Update Status in HR	Select one of these values to automate the completion of the I-9 HireRight journey tasks: ◦ Auto update I-9 status: Automatically updates the I-9 status in the work relationship. ◦ Auto update I-9 status and task status: Automatically updates the I-9 status in the work relationship and the I-9 task status as completed. ◦ Auto update task status: Automatically updates the I-9 task status as completed. ◦ I-9 status update after manual task completion (default value): I-9 status in the work relationship is updated only after you manually mark the task as complete. ◦ Never update: I-9 status in the work relationship is never updated. If you have selected a value to automatically mark the I-9 task as complete, then you don't need to return to the journey task and manually mark it as done. If you select the **Auto update I-9 status and task status** or **Auto update task status** value, then it's recommended to hide the **Done** button for the task using Display Settings.
Account Code	You need to obtain this value from HireRight, this is the company account code.
Enable integration and send information to external service provider when candidate is selected and has accepted job offer	Selected, indicates that attributes from HCM will be shared with HireRight

Field	Values

4. Click **Save**.

Validate the Integration

1. Click **Validate** to confirm that the integration works.
2. Click **Save**. The integration is successful if no errors are displayed.

Configure Options to Automatically Update Status in HR

If you want to automate the completion of the I-9 HireRight journey tasks, you can configure one of these values for the Update Status in HR field. To enable the status push, you need to follow these steps:

1. Set the ORA_PER_CHK_ENABLE_I9_CALLBACK profile option value to Y.
2. Configure the API User and Password in Cloud HCM status along with the relevant roles.
    a. Create a role. To do this, follow these steps:
        i. Navigate to Security Console > Roles. Click **Create Role**.
        ii. Enter the details shown in this table:

Role Name	Role Code	Role Category
Journey Administrator	PER_JOURNEY_ADMINISTRATOR	HCM - Job Roles

        iii. Under Role Hierarchy, click **Add**, and enter the details shown in this table:

Role Name	Role Code
Use REST Service - Worker Journeys	ORA_PER_REST_SERVICE_ACCESS_WORKER_JOURNEYS

        iv. Click **Save and Close**.
    b. Set the security profile. To do this, follow these steps:
        i. Navigate to the Setup and Maintenance work area. Search for the Manage Data Role and Security Profiles task.
        ii. Search for the PER_JOURNEY_ADMINISTRATOR role code. Click **Edit**.
        iii. Under Security Criteria for Person > Person Security Profile, search for View All Workers.
        iv. Click **Next**, and then click **Submit**.
    c. Create a user. To do this, follow these steps:
        i. Navigate to Security Console > Users.
        ii. Click **Add User Account**.
        iii. Create the user with the relevant details for First Name, Last Name, Email, and Username and Password.
        iv. Under Roles, add the PER_JOURNEY_ADMINISTRATOR role for the created user.
        v. Click **Save and Close**.
3. Provide the configured username and password in step 2c to HireRight.
4. HireRight will then enable the status push using the credentials provided in Step 3.

5. Configure one of these values depending on how you want the I-9 tasks and I-9 status to be completed and updated respectively.

Lookup Code	Old Meaning	New Meaning	Description
I9_STATUS	Not applicable	Auto update I-9 status	Automatically updates the I-9 status in the work relationship.
Y	Always	Auto update I-9 status and task status	Automatically updates the I-9 status in the work relationship and the I-9 task status as completed. Section 1 task in Cloud HCM will be marked as Completed when the I-9 status in HireRight is **Pending Employer**. Section 2 task in Cloud HCM will be marked as Completed when the I-9 status in HireRight is **Completed**. This is the recommended option.
TASK_STATUS	Not applicable	Auto update task status	Automatically updates the I-9 task status as completed. Section 1 task in Cloud HCM will be marked as Completed when the I-9 status in HireRight is **Pending Employer**. Section 2 task in Cloud HCM will be marked as Completed when the I-9 status in HireRight is **Completed**.
C	Only on completion	I-9 status update after completion of the I-9 Verification Status task	I-9 status in the work relationship is updated only after completion of the I-9 Verification Status task.
N	Never	Never update	I-9 status in the work relationship is never updated.

Note: If you use Location-based Access Control (LBAC), you need to ensure that the HireRight addresses are appropriately configured. Ensure that the users performing I-9 tasks have the PER_EDIT_WORK_RELATIONSHIP_DATA and PER_CHANGE_WORKER_ASSIGNMENT_DATA data privileges, so that the I-9 status can be updated from the journey.

Configure Attributes to Send to HireRight

These attributes are sent from HCM to HireRight. On the Checklist Integrations page, you can indicate which attributes shouldn't be sent.

- Worker First Name
- Worker Last Name
- Worker Email Address (not configurable and is always sent)
- Worker Address
- Worker Social Security Number
- Worker Date of Birth
- Hiring Manager First Name
- Hiring Manager Last Name
- Hiring Manager Email Address
- Worker Location Code
- Worker Location Name
- Worker Start Date
- User Reference for Section 2
    - Prior to release 23C, the Primary Email value was the only value in the **User Reference for Section 2** field and the value was selected by default. The Person Identifier and Person Number values are now added in the field. If you plan to change the value in the field, you must let HireRight know of this change. This is to make sure that changes are in sync on the HireRight side as well.

If you use Cloud HCM (for I-9) and Oracle Recruiting integration (for background check), it's highly recommended to keep the default option of Email Address as the identifier for User Reference for Section 2. However, if for certain business reasons you want to change the value for the User Reference for Section 2 field, then you need to follow these steps which are applicable for existing and new customers:

1. If you want to modify the value of User Reference for Section 2 from the default value of Email Address, you need to first contact HireRight. Changes on the HireRight portal must be completed before you modify this configuration in Cloud HCM. If this sequence of changes is not followed, your integration will fail.

   If you want to update the value of User Reference for Section 2 to a value other than Email Address, you need to provide the selected identifier value for each user (person number or person identifier) to HireRight.
2. Update the Profile Option in Cloud HCM.

   To change the User Reference for Section 2, use the profile option ORA_PER_CHK_ENABLE_I9_USERREF_CHANGE (Update of User Reference Enabled for I-9 Section 2). By default, this profile option is set to N. If it is changed to Y, then you will get the above values in the list of values, and the value of User Reference for Section 2 can be configured to any one of them.
3. Update the configuration of the User Reference for Section 2 field in Cloud HCM.

   You can configure one of these values:

- Primary Email (this is the default value)
- Person Number
- Person Identifier

Correction of I-9 in HireRight

If an I-9 document is corrected in HireRight which changes the I-9 Status or E-Verify status, then based on the value configured for the Update Status in HR field in Cloud HCM, the task will be reopened. That is, if the value is **Auto update I-9 status and task status** or **Auto update task status**, then the task in Cloud HCM will be reopened.

Update Termination Date for I-9 in HireRight

You need to build a custom report in Cloud HCM that includes ClientApplicantId (Person ID), ClientRequestID (Checklist Allocated ID), Termination Date, and other required attributes for the terminated workers. You need to manually provide this report to HireRight for them to upload the termination dates accordingly.

For more information about HireRight integration, see the Journeys - Integration with HireRight document (https://community.oracle.com/customerconnect/discussion/631000) on Customer Connect.

Create Journey Tasks for I-9 Process

You're creating an I-9 verification task for new hires in your organization based in the USA. HireRight is your third-party service provider for the I-9 verification process.

The I-9 form has two sections that need to be validated by both employee and employer in HireRight. Additionally, the I-9 verification status is available once the two sections are completed. So, you create three tasks for each of the sections and assign it to the respective task performers.

You need these details for the task:

- Integration code obtained during the setup process. You can't create the tasks without this code.
- HireRight user accounts for HR representatives to verify documents, generate the web link, and check the processing status.
- To transfer the completed I-9 form into Document Records, configure a document type and associate it to the I-9 Verification Status journey task. Additionally, the transfer must be enabled and configured on the HireRight side first.

Create I-9 Task for New Hire

1. In the Setup and Maintenance work area, go to the Checklist Templates task.
2. On the Create Checklist Templates page, on the General tab select the journey category and enter relevant details.
3. Click **Save** and then click the Tasks tab.
4. Click **Add** and enter details of the first task as detailed here. For other fields, use default values.

Field	Value
Name	Initiate I-9 Verification Process

Field	Value
Description	Optional
Status	Active
Preceding Task	Leave blank
Required	Yes
Target Duration	1 day
Task Performer	Employee
Owner	Area of Responsibility, HR representative
Action Type	I-9 Verification
I-9 Section	I-9 Section 1- Employee
I-9 Configuration	Integration code from setup
Attachments	Selected
Comments	Selected
Notes	Complete this task before the end of the first day.

5. Click **Save**.

When this task gets assigned, new hires use their single sign on to go to the HireRight site and verify or update their details. The I-9 status in the HCM Work Relationship section won't be updated after the new hire completes Section 1 as they don't have the necessary privileges.

Create I-9 Task for Line Manager

Line managers can do this task only when the employee completes the section 1 task.

1. In the Task tab, enter these details for the second task. For other fields, use default values.

Field	Value
Name	Verify Employee Details for I-9 Verification
Description	Optional
Status	Active
Preceding Task	Initiate I-9 Verification Process
Required	Yes
Target Duration	6 days
Task Performer	Line Manager
Owner	Area of Responsibility, HR representative
Action Type	I-9 Verification
I-9 Section	I-9 Section 2 - Employer
I-9 Configuration	Integration code from setup
Attachments	Selected
Comments	Selected
Notes	Verify employee's details.

2. Click **Save**.

If the task to complete I-9 Section 2 is configured with Line Manager as performer, the I-9 status in the HCM Work Relationship section may not be updated after they complete Section 2 as they might not have the necessary privileges.

However, if a HR representative completes I-9 Section 2 and has the necessary privileges, then the I-9 status in the HCM Work Relationship section is updated.

Create I-9 Task for HR Representative

HR representatives can review the I-9 verification status any time.

1. In the Tasks tab, enter these details for the third task. For other fields, use default values.

Field	Values
Name	Review I-9 Verification Status
Description	Optional
Status	Active
Preceding Task	Leave blank
Required	Yes
Target Duration	10 days
Task Performer	Line Manager
Owner	Area of Responsibility, HR representative
Action Type	I-9 Verification
I-9 Section	I-9 Section Verification Status
I-9 Configuration	Integration code from setup
Attachments	Selected
Document Type	Completed I-9 Form
Comments	Selected
Notes	Check employee's I-9 verification status.

2. Click **Save**.

When you verify the completed form, you need to click **Upload to Document Records** to move the completed form to Document Records.

Here are some points to consider:

- It's recommended to configure I-9 Verification Status process task with performer as HR Representative as part of your template. This enables the HR representative to view the I-9 status of the new hire in Journeys at any point during the I-9 process.
- If there's no document type configured in the I-9 Verification Status task, then Upload to Document Records won't be visible.
- If Section 1 and Section 2 of the I-9 Form aren't complete, then Upload to Document Records won't be visible.

- If there's a document type configured in the I-9 Verification Status task and this feature isn't enabled from HireRight, Upload to Document Records is visible but displays an error when the task performer clicks it.
- When you use the **Auto update status and task status** option for Update Status in HR, the completed I-9 form isn't automatically moved to Document Records. To move the completed I-9 to Document Records, you need to configure the I-9 Verification Status section task and the task performer, usually a HR Representative needs to manually perform the **Upload to Document Records** action.
- Only users with the PER_EDIT_WORK_RELATIONSHIP_DATA and PER_CHANGE_WORKER_ASSIGNMENT_DATA data privilege can update the I-9 status from the journey.
- After the user marks the journey tasks corresponding to Section 1, Section 2, and the I-9 Verification Status as complete, the statuses are updated. Performers of Section 1 and Section 2 should mark the task complete only after completing the corresponding sections in HireRight.
- When the I-9 Verification Status task is marked as Complete, the appropriate I-9 verification status is updated in the Work Relationship section if the user completing it has the necessary privileges.
- If the E-verify process is enabled from HireRight, the appropriate status is updated in the Work Relationship section.
- If **Update Status in HR** is set to Yes in the Checklists Integrations configuration page, the I-9 Status, e-Verify Status, and I-9 Expiration values are automatically updated based on the response sent from HireRight.

Statuses Sent from HireRight to HCM Using Journeys

This table lists the statuses sent from HireRight to HCM.

Status	Value
Pending Employee	R – Ready to Verify
Pending Employer	S- Submitted for Verification
Completed	V-Verified
API Error	Error in verification
Not started	N-Not started
Pending Remote Agent	PRA-Pending Remote Agent
Any status other than the above	I-Incomplete

Points to Consider

- If there is an application error, the work relationship status isn't updated.
- The values retrieved from HireRight are stored in the PER_PERIODS_OF_SERVICE table. The values are stored in these flexfield segments:
    - PDS_INFORMATION1 (I-9 Status)
    - PDS_INFORMATION_DATE1 (I-9 Expiration)

- PDS_INFORMATION5 (E-Verify Status)

The flexfield segments are available in the **United States Work Relationship Information** context of the PER_PPS_LEG_DDF flexfield.

Flexfield Mapping in HireRight for Journeys

These attribute values are sent to HireRight as HireRight I-9 document flexfields:

Code	Meaning
PersonNumber	Employee Identifier
PersonId	Person Identifier
AllocatedChecklistId	Allocated Checklist Identifier
LocationCode	Worker Location Code
LocationName	Worker Location Name
WorkLocationState	Worker Location State

Seeded Lookups for HireRight eVerification Status for Journeys

The code for the e-verify statuses associated with the seeded lookup type ORA_HRX_US_EVERIFY_STATUSES (E-Verify Status from HireRight) is listed in this table.

Lookup Code	Meaning	Description
ADDITIONAL_VERIFICATION	Institute Additional Verification	Allow more time for DHS or SSA to provide the employment eligibility status.
AUTHORIZED	Employment Authorized	The employee's information matched SSA or DHS records.
CASE_IN_CONTINUANCE	Case in Continuance	More time is needed to determine a final case result.
DHS_AUTHORIZED	DHS Employment Authorized	The employee's information matched the DHS records.
DHS_CONTINUANCE	DHS Case in Continuance	The employee has contacted DHS, but more time is needed to determine a final case result.

Lookup Code	Meaning	Description
DHS_FINAL_NON_CONFIRM	DHS final nonconfirmation	E-Verify cannot verify an employee's employment eligibility even after the employee has contacted DHS.
DHS_IN_PROGRESS	DHS Verification in Progress	The case is referred to DHS for further verification.
DHS_INFO_REVIEW_REQ	DHS Info Review Required	Review of the employee's info is required.
DHS_NO_SHOW	DHS No Show	The employee did not contact DHS within the required eight federal government workdays.
DHS_TENTATIVE_NON_CONFIRM	DHS tentative nonconfirmation	Information does not initially match DHS records.
DRAFT	Draft	The employee's information is in draft.
DUPLICATE_CASE	Duplicate Case	The employee's information already exists.
ERROR	Error	E-Verify is currently down.
FINAL_NON_CONFIRM	Final nonconfirmation	E-Verify cannot verify an employee's employment eligibility.
IN_PROGRESS	In Progress	Temporary status used when an E-Verify integration has been queried but no Verification Status received yet.
INFO_REVIEW_REQ	Info Review Required	Review of the employee's info is required.
ORA_UNKNOWN	Unknown	The status is unknown.
PHOTO_MATCH_REQD	Photo Match Required	Indicates that the photo displayed on the E-Verify screen does not match the photo on the employee's document.
PHOTO_MATCHING_REQD	Photo Matching Required	Indicates that the photo displayed on the E-Verify screen does not match the photo on the employee's document.
REVERIFY_REQUIRED	Reverify required	Review of the employee's info is required.
SCAN_UPLOAD	Scan And Upload	The employee needs to scan and upload some documents.
SSA_AUTHORIZED	SSA Employment Authorized	The employee's information matched SSA records.
SSA_CONTINUANCE	SSA Case in Continuance	The employee has visited an SSA field office, but more time is needed to determine a final case result.
SSA_FINAL_NON_CONFIRM	SSA Final Nonconfirmation	E-Verify cannot verify an employee's employment eligibility even after the employee has visited or contacted SSA.
SSA_INFO_REVIEW	SSA Info Review Required	Review of the employee's info is required.
SSA_REVERIFY_REQUIRED	SSA reverify required	Review of the employee's info is required.
SSA_TENTATIVE_NON_CONFIRM	SSA tentative nonconfirmation	Information does not initially match SSA records.

Lookup Code	Meaning	Description
TENTATIVE_NONCONFIRM	Tentative nonconfirmation	Information does not initially match.
TENTATIVE_NONCONFIRM_DHS	Tentative nonconfirmation - asked by DHS	Tentative non-confirmation closing case status.
TENTATIVE_NONCONFIRM_INV_QUERY	Tentative nonconfirmation - invalid query	Tentative non-confirmation closing case status.
TENTATIVE_NONCONFIRM_NO_AUTH	Tentative nonconfirmation - unauthorized/ terminated	Tentative non-confirmation closing case status.
TENTATIVE_NONCONFIRM_OTHER	Tentative nonconfirmation - other	Tentative non-confirmation closing case status.
TENTATIVE_NONCONFIRM_SSA	Tentative nonconfirmation - asked by SSA	Tentative non-confirmation closing case status.

Remote I9 Process in Journeys HireRight Integration

You can order HireRight's I9 Remote service when using HireRight integration with Journeys. The service lets you use authorized agents nationwide who will complete section 2 of I9 Form and physically inspect your employee's identity and work authorization documents.

The HireRight I9 Remote service is a convenient solution for employers with remote workers. By using this service, employees can fulfill USCIS Form I9 requirements anywhere in the United States without the need to visit a physical location.

Enable HireRight I9 Remote Service

1. Contact HireRight to activate the HireRight I9 Remote service with your HireRight account.
2. To order the HireRight I-9 Remote service, ensure these actions:
    a. The employee phone number is available to start remote I9 verification.
    b. The employee hire date is 5 working days after the date of I9 creation.
3. Select **Yes** for the **I-9 Remote** option during the employee hire process.
4. Turn on the ORA_PER_CHK_ENABLE_I9_REMOTE profile option to enable the remote I9 feature. By default, this profile option is set to N. To turn on the profile option, follow these steps:
    a. Navigate to the Setup and Maintenance work area.
    b. Search for and click the **Manage Administrator Profile Values** task.
    c. Search for the ORA_PER_CHK_ENABLE_I9_REMOTE profile option code and select the profile option in the search results.
    d. In the ORA_PER_CHK_ENABLE_I9_REMOTE: Profile Values area, enter **Y** in the **Profile Value** field.
    e. Click **Save and Close**.
    f. Click **Done**.

Points to Consider

- If remote I9 verification is enabled, the line manager can access the I9 section 2 task as a PDF document in read-only mode.
- When an employee completes their section 1 task, the I9 status will be moved to **Pending Remote Agent**.

- Once the representative completes the section 2 worksheet, the I9 status will be moved to status **Pending Employer**.

> **Note:** For Remote I9 to function seamlessly, you need to select the **Auto update I-9 status and task status** value in the **Update Status in HR** field.

- When the I9 status is **Pending Employer**, access and complete the remainder of the I9 section 2 task.

How You Use Multiple HireRight Accounts in Journeys

If you have multiple HireRight accounts for your organization, you can plan and use those accounts to configure multiple journey integrations.

You can do this by using the unique Integration Code and the appropriate Account Code (provided by HireRight) in the integration. Then, when you configure the I-9 tasks, you can reference the appropriate integration code.

For example, you can configure two I-9 tasks that reference two integrations associated to locations A and B respectively. When creating the I-9 tasks in a journey template, you associate the appropriate integration code for the task that's based on the criteria on which this task will get assigned.

You can configure an Eligibility Profile and associate it to this task so that the task gets assigned to assignees in Location A and Location B respectively.

Diagnostic Report for I-9 Integration Errors in Journeys

You can use the **HCM Checklist I9 Integration Error Report** to analyze the I-9 integration errors for I-9 journey tasks in Cloud HCM.

You can access this report by using this navigation: Navigator > Tools > Diagnostic Dashboard. Search for the **HCM Checklist I9 Integration Error Report** diagnostic report and click **Add to Run**.

22 Oracle Process Automation Task Type

Integrate with Oracle Process Automation in Journeys

Integration with Oracle Process Automation (OPA) enables you to extend journeys and create Process Automation tasks for automating certain business processes in your organization.

When assigned, the task performer can initiate and track the status of the request in their journey or journey task. For example, asset request for a new hire.

Before You Start

- Purchase OPA to use with Journeys. OPA is then automatically provisioned to your environments.
- Configure Oracle Identity Cloud Service.
- In OPA, configure and activate the process application you need to use.
- For more information about OPA, see these resources on Oracle Help Center:
  - Using Oracle Cloud Infrastructure Process Automation guide
  - Oracle Process Automation guide

Configure the Journey Integration Task

1. Define the integration in the Setup and Maintenance work area.
   - Go to the Checklist Integrations task and add a new integration.
2. On the Add Integration page, select **Process Automation** as the Integration Category.
   - Select **Structured process** as the integration type. This denotes a process that includes a start event, end event, and other elements required for the flow.
   - Enter a unique integration code.
   - Select a process from the **Process Name** drop-down list.
3. Validate to confirm connectivity to the application and process defined in Oracle Integration. Click **Save**.
   - Enable and send information for process automation integration.
4. Save the integration details.
5. Go to the **Checklist Templates** task and create a task of type **Process Automation**.
6. Select the **Process Configuration** to which the task needs to be associated.
7. For each OPA process, you must set up two tasks as follows:
   - A task with **Start Process** to initiate the process.
   - A task **Check Process Status** to see the status of the process.
8. Assign the journey. When the task performer clicks **Start**, the process is initiated.

Example of Creating Oracle Process Automation Tasks in Journeys

In this example, you are creating Oracle Process Automation (OPA) tasks for the worker uniform request process in your organization.

The OPA task includes two sub-tasks. The first task is to initiate the process request and a second to check the status. So, you create two separate tasks, include it in a journey, and assign it to the respective task performers.

Before You Start

- Create and activate the process application and processes in OPA.
- Configure and validate the integration in the Setup and Maintenance work area in HCM Cloud.

Create Task for Worker to Start Process

1. In the Setup and Maintenance work area, go to the Checklist Templates task.
2. On the Create Checklist page, on the General tab select the journey category and enter relevant details.
3. Click **Save** and then click the **Tasks** tab.
4. Click **Add** and enter details of the first task as described in this table. For other fields, use default values.

Field	Value
Name	Initiate Uniform Request
Description	Optional
Status	Active
Preceding Task	Leave blank
Required	Yes
Target Duration	3 days
Task Performer	Worker
Owner	Initiator
Task Type	Process Automation
Process Section	Start Process
Process Configuration	Uniform Request

5. Click **Save**.

When this task is assigned, the performer clicks **Start** to initiate the request.

Create Task for Area of Responsibility to Verify Status

The area of responsibility user can do this task only when the Start Process task completes.

1. In the Task tab, enter these details for the second task. For other fields, use default values.

Field	Value
Name	Check the Status of the Uniform Request
Description	Optional
Status	Active
Preceding Task	Initiate Uniform Request
Required	Yes
Target Duration	5 days
Task Performer	Area of Responsibility
Responsibility Type	Union representative
Owner	Initiator
Task Type	Process Automation
Process Section	Check Process Status
Process Configuration	Uniform Request

2. Click **Save**.

The performer can click **See Status** to verify the status of the task.

You can access the OPA Process Cloud Start Form directly from the journey task and navigate back to the journey. To do this, follow these steps:

1. Configure a journey integration with OPA. To do this, follow these steps:
    a. On the application home page, click the **My Client Groups** tab.
    b. Click **Show More** under Quick Actions.
    c. In the Journeys Setup area, click the **Journeys Setup** quick action.
    d. On the Journeys Setup page, click the **Integrations** card.
    e. On the Journey Integrations page, click **Add**.
    f. On the Configure Journey Integration page, select the **Process Automation** category.
    g. Select the **Structured Process - Form Start** type.
    h. Enter a unique integration code.
    i. Select the specific application name.
    j. Select the specific process name.
    k. Make sure that the **Enable and send information for process automation integration** check box is selected.
    l. Click **Validate** to confirm connectivity to the OPA instance. The status is updated when the validation is successful.
    m. Click **Save and Close**.
2. Set up a journeys task to open an OPA Process Cloud Start Form for a process application hosted by OPA.

23 Use Activation Criteria to Trigger Tasks

Overview of Activation Criteria for Journey Tasks

You can use the activation criteria when you need to activate dependent tasks based on the user's response to a preceding task.

Using the activation criteria, the dependent tasks can be activated based on these user responses:

- Marks a task as either **Done** or **Not Applicable**.
- Responds to a specific question with a specific response in a Questionnaire task.
- Provides input to a specific segment with a specific value in a Configurable Form task.

You can configure an activation criteria when you create a task. This causes the task to be activated when the criteria is met. For example, say you have a task where employees need to respond with a Yes or No for their vaccination certificate. If they answer Yes, you can use the activation criteria to check for this response and trigger a dependent task where they can upload their vaccination certificate. If they answer No, you can use the activation criteria to check and trigger a dependent task where they respond to a Wellness check questionnaire. You can achieve this by renaming the Done button to Yes and the Not Applicable button to No. You can then configure Activation Criteria for the respective dependent tasks.

You can configure dependent tasks to activate Task 2 only after Task 1 is completed. If Task 1 has a pending approval, the configuration won’t wait for the Task 1 approval to be completed. The Task 2 is activated when the employee completes Task 1.

Configuring the Activation Criteria

1. Create a fast formula that includes conditions. The formula type needs to be Participant and Rate Eligibility.
2. Associate the fast formula to an eligibility profile.
3. Select the eligibility profile as the task activation criteria for the dependent task that needs to be activated if the condition is met.

You can only access these attributes of the dependent task in the fast formula:

- ACTUAL_END_DATE
- ALLOCATED_CHECKLIST_ID
- ALLOCATED_TASK_ID
- ATTRIBUTE_DATE1
- ATTRIBUTE_DATE2
- ATTRIBUTE_DATE3
- ATTRIBUTE_NUMBER1
- ATTRIBUTE_NUMBER2
- ATTRIBUTE_NUMBER3

- ATTRIBUTE1
- ATTRIBUTE2
- ATTRIBUTE3
- ATTRIBUTE4
- ATTRIBUTE5
- COMPLETED_BY
- DEP_ALLOCATED_TASK_ID
- FLEX_CONTEXT_CODE
- PERFORMER_PERSON_ID
- PERFORMER_USERNAME
- QUESTIONNAIRE_ID
- REOPEN_DATE
- STATUS
- TARGET_END_DATE

How the Activation Criteria is Evaluated

The activation criteria is evaluated based on the response of the user. It's unlike the task eligibility profile which is evaluated at the time of journey assignment.

All the dependent tasks are visible but grayed out. Once the activation criteria is evaluated, tasks that meet the criteria become visible and active. Tasks that don't meet the criteria won't be visible. A task that doesn't meet the activation criteria is no longer displayed once the preceding task reaches a terminal status.

Consider these use cases:

Automatic Reopening of Task Marked as Not Applicable

If you reopen a task that's configured with an activation criteria, the activation criteria won't be re-evaluated again for the reopened task. For example, consider this scenario. There are 3 tasks in a journey. Task 1 is configured with the following activation criteria:

- If task 1 is marked as Done, then task 2 should be activated.
- If task 1 is marked as Not Applicable, then task 3 should be activated.

In this case, when the user marks task 1 as Done, task 2 gets activated and task 3 is automatically marked as Not Applicable and can't be acted upon. Now, even if task 1 is reopened and the user marks task 1 as Not Applicable, task 3 won't be activated. This is because the activation criteria won't be re-evaluated again for the reopened task 1.

Manual Reopening of Task Marked as Not Applicable

The application can automatically mark a task as non-applicable if the task is configured with an associated activation criteria. If a dependent task is activated based on the main task, the dependent task can't be reopened. For example, consider this scenario. Task 2 and task 3 are dependent on task 1. When the user marks task 1 as Done, task 2 is activated and task 3 is automatically marked as Not Applicable. In this case, you can't reopen task 3 because it was automatically marked as Not Applicable based on the activation criteria configured in task 1.

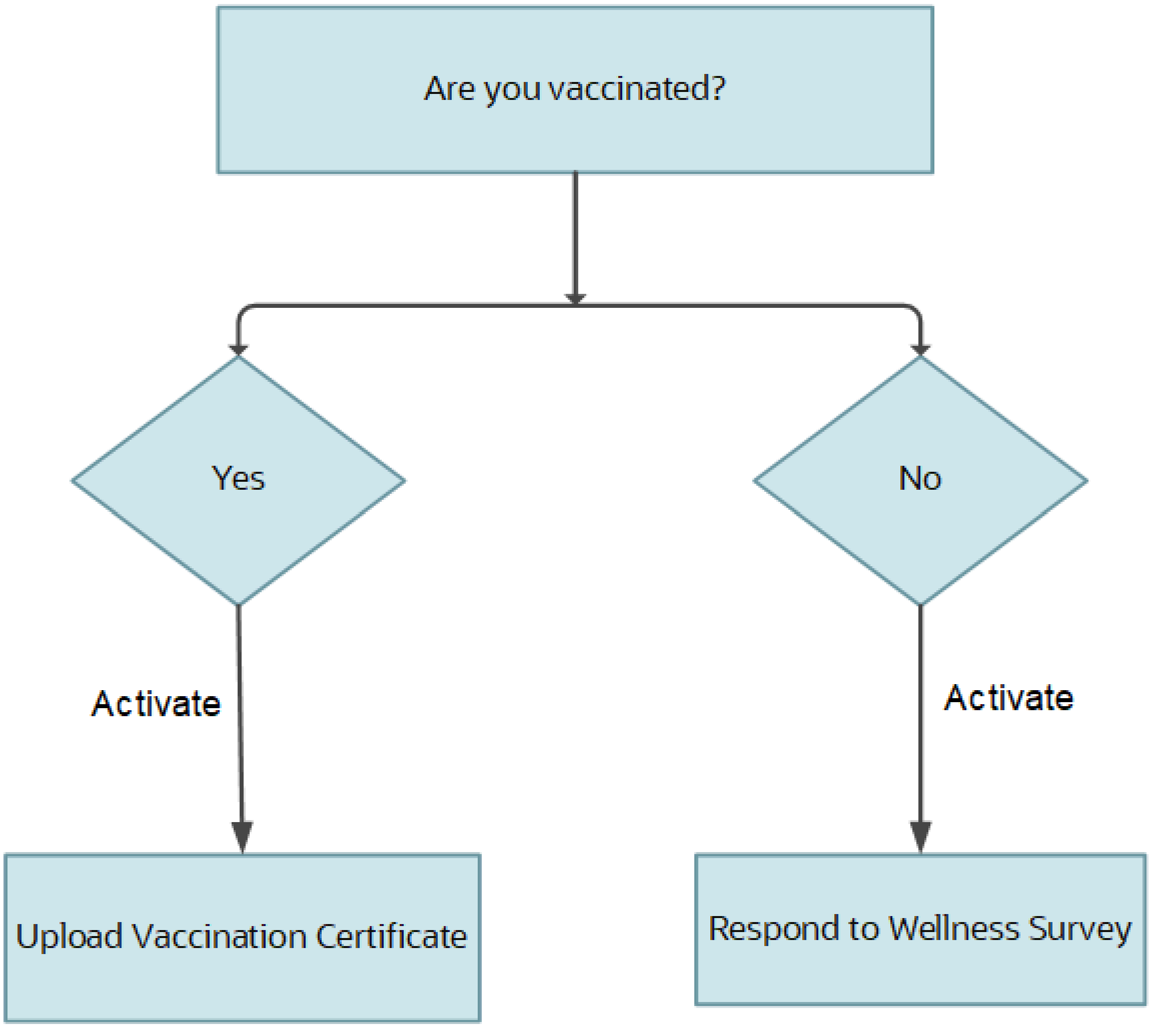
For more information about fast formulas, see the Administering Fast Formulas guide on Oracle Help Center.

Example of Activating Journey Tasks Based on Task Status

Let's take a look at how you can activate a dependent task based on the response provided by the user in a previous task.

This example assumes you have set up a task that asks users if they are vaccinated. You have renamed the task action labels Done to Yes and Mark as Not Applicable to No so that users can respond with a Yes or No. If the response is Yes, you want the condition to activate a task where they upload their vaccination certificate and if the response is No, you want the condition to activate a wellness assessment task.

This image illustrates the scenario when a task is activated based on a simple Yes or No response.



This sample formula checks for the status in the first task. If the response is Done or Yes, it activates the upload vaccination certificate task.

```
INPUTS ARE STATUS(text)
DEFAULT FOR L_STATUS IS 'REJ'
L_STATUS = STATUS
ELIGIBLE = 'N'
IF L_STATUS = 'COM' THEN
(
ELIGIBLE = 'Y'
)
ELSE
(
ELIGIBLE = 'N'
)
RETURN ELIGIBLE
```

This sample formula checks for the status in the first task. If the response is Not Applicable or No, it activates the wellness assessment task.

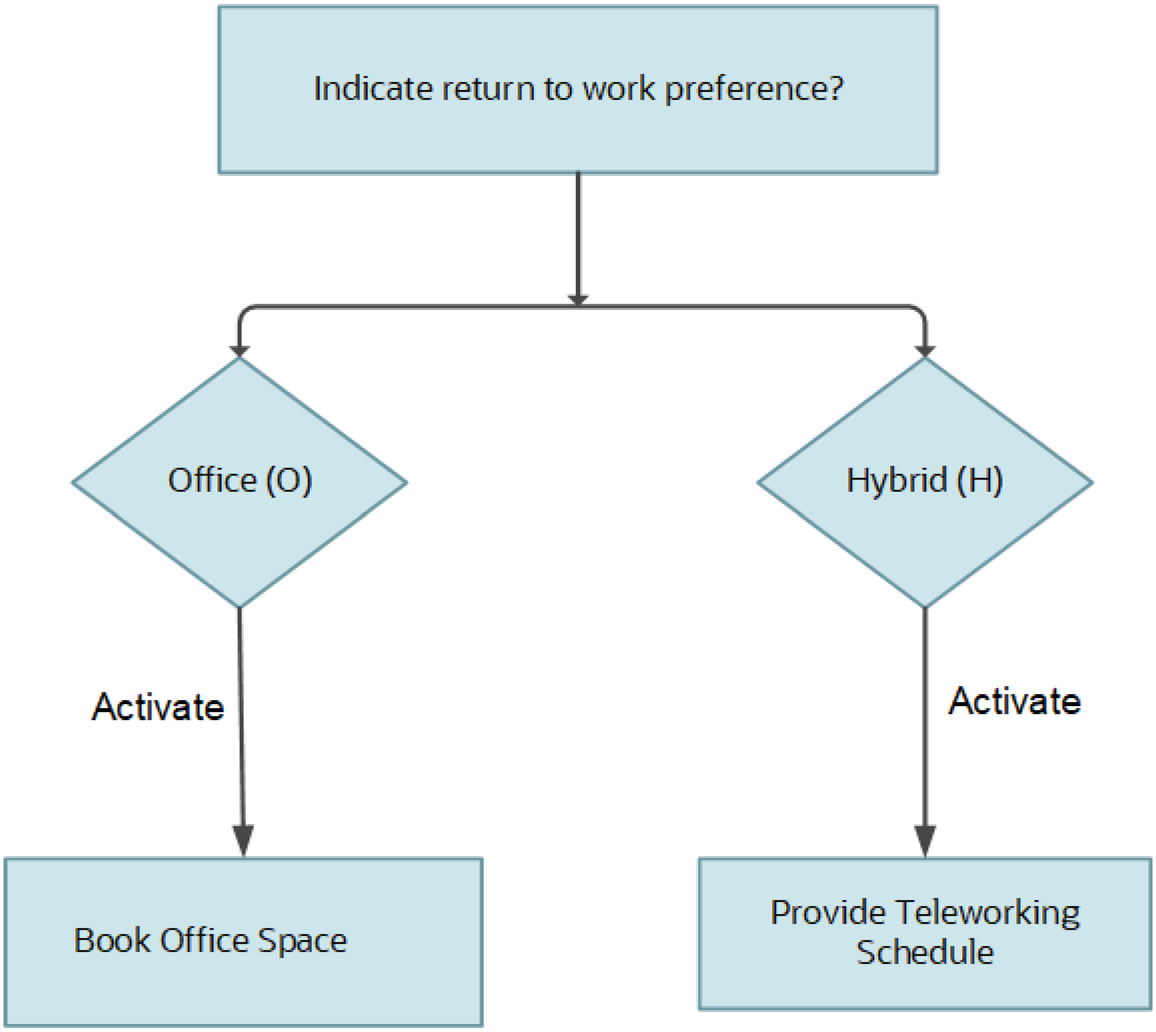
```
INPUTS ARE STATUS(text)
DEFAULT FOR L_STATUS IS 'COM'
L_STATUS = STATUS
ELIGIBLE = 'N'
IF L_STATUS = 'REJ' THEN
(
ELIGIBLE = 'Y'
)
ELSE
(
ELIGIBLE = 'N'
)
RETURN ELIGIBLE
```

Example of Activating Journey Tasks Based on Input to a Configurable Form

Let’s take a look at how you can activate a dependent task based on the response provided by the user in a configurable form segment.

This example assumes you have set up a task that asks users what is their preferred work mode when they to return to work. You have configured a configurable form using the journey descriptive flexfield to capture the response to the question. If the response is O (Office), you want the condition to activate a task where they book their office space and if the response is H (Hybrid), you want the condition to activate the task that records their remote working preference.

This image illustrates the scenario when a task is activated based on the user's response to a configurable form.



This sample formula takes the descriptive flexfield segment as input to branch to activate other tasks. If the response to that segment in a configurable form is O, it activates the book office space task.

```
INPUTS ARE ATTRIBUTE1(text)
DEFAULT FOR L_ATTR IS 'H'
ELIGIBLE = 'N'
L_ATTR = ATTRIBUTE1
 IF L_ATTR = 'O' THEN
 (
 ELIGIBLE = 'Y'
 )
 ELSE
 (
 ELIGIBLE = 'N'
 )
RETURN ELIGIBLE
```

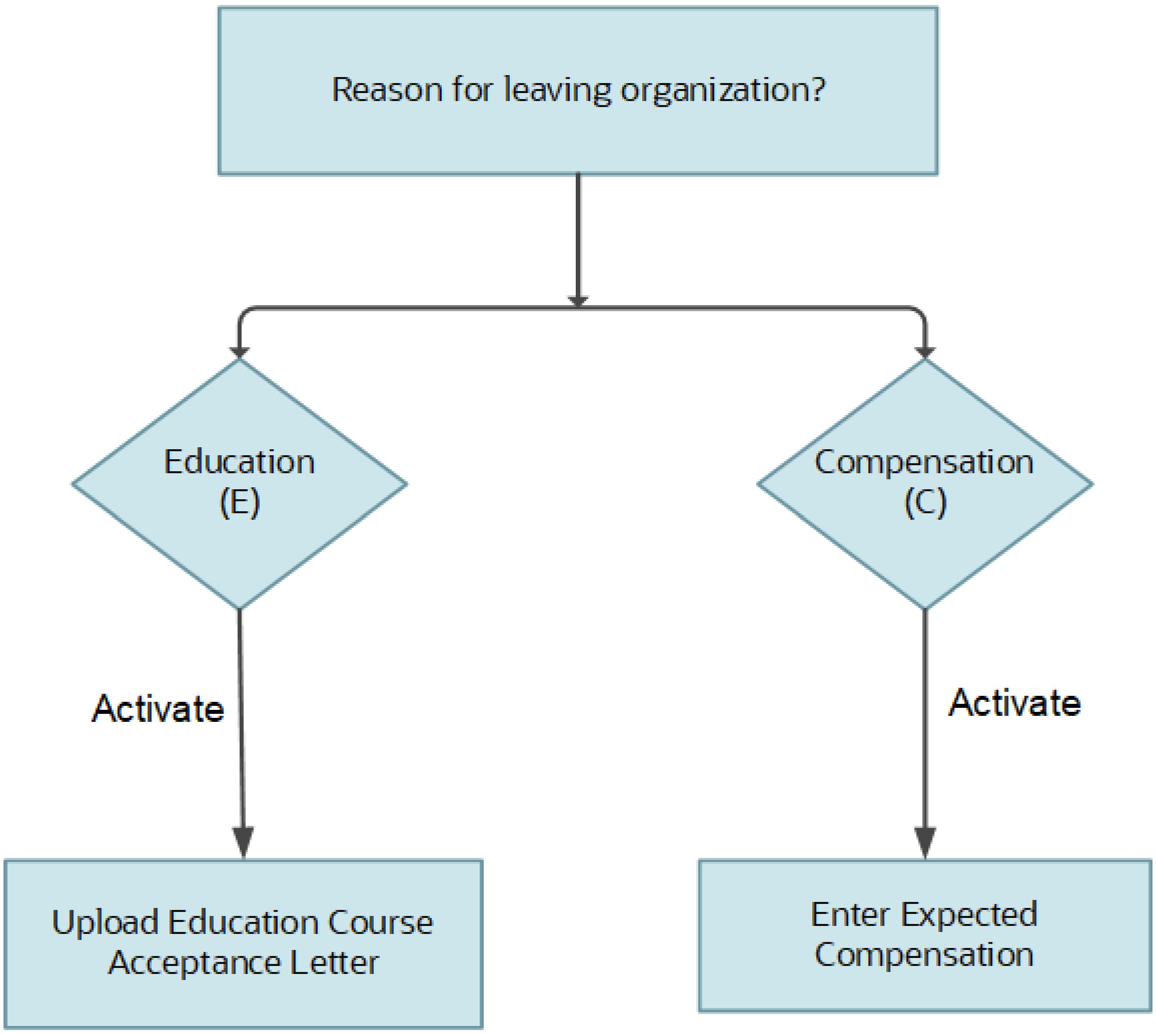
This sample formula takes the descriptive flexfield segment as input to branch to other tasks. If the response to that segment in a configurable form is H, it activates the task to store the remote working preference.

```
INPUTS ARE ATTRIBUTE1(text)
DEFAULT FOR L_ATTR IS 'O'
ELIGIBLE = 'N'
L_ATTR = ATTRIBUTE1
 IF L_ATTR = 'H' THEN
 (
 ELIGIBLE = 'Y'
 )
 ELSE
 (
 ELIGIBLE = 'N'
 )
RETURN ELIGIBLE
```

Example of Activating Journey Tasks Based on Input to a Questionnaire

Let's take a look at how you can activate a dependent task based on the response provided by the user to a specific question in a questionnaire.

This example assumes you have set up a questionnaire task that includes filling up a predefined exit survey at the time of offboarding. One of the questions in the questionnaire asks users to provide the reason for leaving the organization. If the response is E (Education), you want the condition to activate a task where upload their education course acceptance letter and if the response is C (Compensation), you want the condition to activate the task that records their expected compensation.
This image illustrates the scenario when a task is activated based on the user's response to a specific question in a questionnaire.



Define a Value Set

To retrieve the response to a question in a questionnaire, you need to create a value set. This sample value set query retrieves the response to the **Provide the reason why you are leaving this organization** question in the Exit Survey questionnaire.

1. Click + to create a value set.

2. In the Create Value Set page, enter these values:

Field	Value
Value Set Code	EXIT_REASON
Description	Value set to retrieve question response.
Module	Search and select Checklist Templates
Validation Type	Table
Value Data Type	Character

3. In the **FROM Clause**, enter this syntax:

```
fusion.per_allocated_checklists pac,  fusion.per_allocated_tasks pat,

fusion.hrq_qstnr_participants hqp,

fusion.hrq_qstnr_responses hqr,

fusion.hrq_qstn_responses hqsr,

fusion.hrq_qstnr_questions hqq,

fusion.hrq_qstnr_sections_b hqs
```

4. In **Value Column Name**, enter `hqsr.answer_text`.
5. In **ID Column Name**, enter `hqsr.answer_text`.
6. In **WHERE Clause**, enter this syntax:

```
pac.allocated_checklist_id = pat.allocated_checklist_id
AND hqp.participant_id = pat.allocated_task_id
AND hqr.qstnr_participant_id = hqp.qstnr_participant_id
AND pat.questionnaire_id = hqp.questionnaire_id
AND hqsr.qstnr_response_id = hqr.qstnr_response_id
AND hqs.questionnaire_id = 2100 – This is the Questionnaire ID for 'Exit Survey' questionnaire.
 AND hqs.qstnr_section_id = hqq.qstnr_section_id
 AND hqq.question_id = 5920 – This is the Question ID for 'Provide the reason why you are leaving this
 organization.' question.
 AND hqq.qstnr_question_id = hqsr.qstnr_question_id
 AND PAC.ALLOCATED_CHECKLIST_ID = :{PARAMETER.AllocatedChecklistId}
```

This example uses the seeded Exit Survey questionnaire and the specific question **Provide the reason why you are leaving this organization** question in the questionnaire. You need to replace the questionnaire_id and question_id in the query provided in step 6 for the question that should be evaluated to trigger dependent tasks. These values are visible on the Questionnaires configuration page as Questionnaire Code and Question Code respectively. This query works only for a text field in a questionnaire.

This sample formula checks the response to a specific question 'Provide the reason why you are leaving this organization' in the seeded Exit Survey questionnaire to activate other tasks. If the response to that question is E, it activates the task where they can upload their education course acceptance letter.

```
INPUTS ARE ALLOCATED_CHECKLIST_ID(number)
DEFAULT FOR L_ATTR IS 'C'
ELIGIBLE = 'N'

ALLOCATED_CHECKLIST_ID_STR = TO_CHAR(ALLOCATED_CHECKLIST_ID)
QUERY = 'XXX'

QUERY = '|=AllocatedChecklistId='''||ALLOCATED_CHECKLIST_ID_STR||''''
L_ATTR = GET_VALUE_SET('EXIT_REASON',QUERY)
```

```
IF L_ATTR = 'E' THEN
(
ELIGIBLE = 'Y'
)
ELSE
(
ELIGIBLE = 'N'
)
RETURN ELIGIBLE
```

This sample formula checks the response to a specific question 'Provide the reason why you are leaving this organization' in the seeded Exit Survey questionnaire to activate other tasks. If the response to that question is C, it activates the task where they can provide their expected compensation.

```
INPUTS ARE ALLOCATED_CHECKLIST_ID(number)
DEFAULT FOR L_ATTR IS 'E'
ELIGIBLE = 'N'

ALLOCATED_CHECKLIST_ID_STR = TO_CHAR(ALLOCATED_CHECKLIST_ID)
QUERY = 'XXX'

QUERY = '|=AllocatedChecklistId='''||ALLOCATED_CHECKLIST_ID_STR||''''
L_ATTR = GET_VALUE_SET('EXIT_REASON',QUERY)

IF L_ATTR = 'C' THEN
(
ELIGIBLE = 'Y'
)
ELSE
(
ELIGIBLE = 'N'
)
RETURN ELIGIBLE
```

Activate Task Based on Questionnaire having Radio Button or Single Choice List as Response Type

Let's take a look at how you can activate a dependent task based on the response provided by the user to specific questions in a questionnaire. The response type for the questions is radio button or single choice list.

This example assumes you have set up a questionnaire task that includes filling up a predefined onboarding survey at the time of onboarding. These are the response types for the two question types in the example:

- Radio button
- Single choice list

For both response types, the approach is the same. The first question in the questionnaire asks users to provide their feedback about feeling welcomed in the organization. This question has a radio button as the response type. The 2 response options are Yes and No. This table shows the response code for the 2 response options.

Question Code	Question Text	Response Code	Description
5860	I am feeling welcome here.	8237	Yes

Question Code	Question Text	Response Code	Description
5860	I am feeling welcome here.	8238	No

The second question in the questionnaire asks users to rate their onboarding experience. This question has a single choice list as the response type. The 2 response options are Excellent, Average, and Bad. This table shows the response code for the 3 response options.

Question Code	Question Text	Response Code	Description
5870	How would you rate your onboarding experience?	8241	Excellent
5870	How would you rate your onboarding experience?	8242	Average
5870	How would you rate your onboarding experience?	8243	Bad

Based on the response to the first question, you can activate a couple of tasks. If the user answers Yes, you can ask them to fill a feedback form on how their first few days have been. If the user answers No, you can ask them to provide suggestions on how the process can be improved, so that they feel more welcomed. To do this, you need to create a value set.

Define a Value Set

To retrieve the response to a question in a questionnaire, you need to create a value set. This sample value set query retrieves the response to the question **I am feeling welcome here** in the Onboarding Survey questionnaire.

1. Click + to create a value set.
2. In the Create Value Set page, enter these values:

Field	Value
Value Set Code	FEELING_WELCOME_HERE
Description	Value set to retrieve question response.
Module	Search and select Checklist Templates
Validation Type	Table
Value Data Type	Character

3. In the **FROM Clause**, enter this syntax:

```
fusion.per_allocated_checklists pac,  fusion.per_allocated_tasks pat,
fusion.hrq_qstnr_participants hqp,
fusion.hrq_qstnr_responses hqr,
fusion.hrq_qstn_responses hqsr,
fusion.hrq_qstnr_questions hqq,
fusion.hrq_qstnr_sections_b hqs
```

4. In **Value Column Name**, enter `hqsr.answer_list`.
5. In **ID Column Name**, enter `hqsr.answer_list`.
6. In **WHERE Clause**, enter this syntax:

```
pac.allocated_checklist_id = pat.allocated_checklist_id
AND hqp.participant_id = pat.allocated_task_id
AND hqr.qstnr_participant_id = hqp.qstnr_participant_id
AND pat.questionnaire_id = hqp.questionnaire_id
AND hqsr.qstnr_response_id = hqr.qstnr_response_id
AND hqs.questionnaire_id = 2000 – This is the Questionnaire ID for 'Onboarding Survey' questionnaire.
 AND hqs.qstnr_section_id = hqq.qstnr_section_id
 AND hqq.question_id = 5860 – This is the Question ID for 'I am feeling welcome here.' question.
 AND hqq.qstnr_question_id = hqsr.qstnr_question_id
 AND PAC.ALLOCATED_CHECKLIST_ID = :{PARAMETER.AllocatedChecklistId}
```

   This example uses the seeded Onboarding Survey questionnaire and the specific question **I am feeling welcome here** in the questionnaire. You need to replace the questionnaire_id and question_id in the query provided in step 6 for the question that should be evaluated to trigger dependent tasks. These values are visible on the Questionnaires configuration page as Questionnaire Code and Question Code respectively.

This sample formula checks the response to a specific question **I am feeling welcome here** in the seeded Onboarding Survey questionnaire to activate other tasks. If the response to the question is Yes (response code 8237), it activates the task where the user is asked to fill a feedback form on how their first few days have been. Note that the FEELING_WELCOME_HERE value set created in step 2 is used along with the response code 8237 for Yes.

```
INPUTS ARE ALLOCATED_CHECKLIST_ID(number)
DEFAULT FOR L_ATTR IS '0'
ELIGIBLE = 'N'
ALLOCATED_CHECKLIST_ID_STR = TO_CHAR(ALLOCATED_CHECKLIST_ID)
QUERY = 'XXX'
QUERY = '|=AllocatedChecklistId='''||ALLOCATED_CHECKLIST_ID_STR||''''
L_ATTR = GET_VALUE_SET('FEELING_WELCOME_HERE',QUERY)
IF INSTR(L_ATTR, '8237', 1, 1) > 0 THEN
(
ELIGIBLE = 'Y'
)
ELSE
(
ELIGIBLE = 'N'
)
RETURN ELIGIBLE
```

The second sample formula checks the response to the same question **I am feeling welcome here** in the seeded Onboarding Survey questionnaire to activate other tasks. If the response to the question is No (response code 8238), it activates the task where the user is asked to provide suggestions on how the process can be improved, so that they feel more welcomed. Note that the FEELING_WELCOME_HERE value set created in step 2 is used along with the response code 8238 for No.

```
INPUTS ARE ALLOCATED_CHECKLIST_ID(number)
DEFAULT FOR L_ATTR IS '0'
ELIGIBLE = 'N'
ALLOCATED_CHECKLIST_ID_STR = TO_CHAR(ALLOCATED_CHECKLIST_ID)
QUERY = 'XXX'
```

```
QUERY = '|=AllocatedChecklistId='''||ALLOCATED_CHECKLIST_ID_STR||''''
L_ATTR = GET_VALUE_SET('FEELING_WELCOME_HERE',QUERY)
IF INSTR(L_ATTR, '8238', 1, 1) > 0 THEN
(
ELIGIBLE = 'Y'
)
ELSE
(
ELIGIBLE = 'N'
)
RETURN ELIGIBLE
```

You can use the fast formulas while creating eligibility profiles. The fast formulas can then be used as activation criteria for the task to be activated based on the response to the questionnaire. Make sure that you set the Questionnaire task as the preceding task of the task to be activated.

You can use the same steps to create the value set and fast formulas for the second question which has single choice list as the response type. A new value set is needed for the second question because it has a different question ID. Other values in the fast formula, such as Value Set Name and Response Code can be used according to the response for which the fast formula is being written. Rest of the steps will be the same.

When to Use Dependent Task and Activation Criteria in Journey Tasks

This table describes the different conditions where you can use dependent task and activation criteria.

Condition	Dependent Task	Activation Criteria
When to use?	When one or more tasks needs to be performed after a preceding task is in terminal status in the same journey.	When one or more tasks needs to be triggered based on the response to another task in the same journey.
Triggering Factor	Preceding task's terminal status.	Preceding task's terminal status and Activation Criteria based on the preceding task's data.
Sample Use Cases	• If you want to verify the data provided in a preceding task, you can create a dependent journey task. For example, create a dependent task with HR Representative or Line Manager as task performer to verify data provided by a new hire as part of their onboarding. If the HR Representative or Line Manager doesn't find the data as per requirement, then they can reopen the original journey task for the new hire to update the data. • If you want to acknowledge that the new hire has reviewed organization policy documents during their onboarding, you can create one journey task of the type Document and attach all your policy documents to that task. Then, create another journey task of type	You have a task where employees need to respond with a Yes or No for their vaccination certificate. If they answer Yes, you can use the activation criteria to check for this response and trigger a dependent task where they can upload their vaccination certificate. If they answer No, you can use the activation criteria to check and trigger a dependent task where they respond to a Wellness check questionnaire.

Condition	Dependent Task	Activation Criteria
	Questionnaire that's dependent on the previous document task. In this task, you can ask all those questions if the user agrees to the various policies. You can even have one field in that Questionnaire asking the user to enter their full name and maybe date, as a means of soft acknowledgement.	

24 Journeys and Document Records

Move Journey Task Attachments to Document Records

You need new hires in your organization to submit copies of their educational certificates, birth certificate, and passport as part of the onboarding process. Instead of creating the document records manually, you use a journey task and enable attachments in it.

So, when new hires complete the task and attach documents, the documents are automatically saved to their document records.

Before You Start

- Use the Document Types task to create the Education and Other Certificates document type. Set Restrict Update to Yes in the Document Record Preferences section. Restrict Delete is anyway set to Yes by default. The document is created as a document record for this document type.
- The attributes Document Name, Issued On are configured as **Relevant** and all other document type attributes as Not Required.

Create a Manual Task with Attachments Enabled

1. Navigate to My Client Groups > Quick Actions > Employment > Checklist Templates.
2. On the Create Checklist Templates page, enter details in the General tab.
3. Click Save and then click the Tasks tab.
4. Click Add and enter details for the task as detailed here. For other fields, use the default values.

Field	Values
Name	Submit your Certificates
Description	Optional
Status	Active
Preceding Task	Leave blank
Required	Yes
Target Duration	3 days
Performer	Employee

Field	Values
Owner	Area of Responsibility, HR representative
Task Type	Manual
Attachments	Yes
Add Attachments to Document Records	Education and Other Certificates
Attachments Are For	Performer

5. Click **Save**.

When this task is assigned to new hires, they can go to the task page and upload their certificates. The documents become available as document records of the specified document type.

Even if you have approvals configured for document records, the document record approval won't start when an attachment is transferred from journey task to Document Records. This is because the creation of the document records is done by using an internal API. So, none of the document record approvals rules are invoked.

If you want the document records to go for approval, then it's recommended that you configure an application task that takes the user from the journey task to document records directly. Consequently, when a document record is created from the Document Records page, it will go for approval.

If you reopen or remove a journey task that had a document record associated with it, the document record is deleted. Therefore, the document record will no longer be visible in the reopened journey task.

How Journey Attachments are Stored in Document Records

The database fields that are populated when attachments from different journey task types are stored in document records, are listed in this table:

DB Field Name	Attachments Enabled for Any Task Type with Document Record	Report with Document Record	Native Electronic Signature with Report and Document Record	I-9 Verification Status Task with Document Record
DOCUMENT_TYPE_ID	Configured in Journey Task setup	Configured in Journey Task setup	Configured in Journey Task setup	Configured in Journey Task setup
PERSON_ID	Person ID of the journey assignee.	Person ID of the journey assignee.	Person ID of the journey assignee.	Person ID of the journey assignee.

DB Field Name	Attachments Enabled for Any Task Type with Document Record	Report with Document Record	Native Electronic Signature with Report and Document Record	I-9 Verification Status Task with Document Record
ASSIGNMENT_ID	Not populated	Not populated	Not populated	Not populated
DOCUMENT_NAME	Journey task name	Journey task name	Journey task name	I-9 completed form name as sent by HireRight
DOCUMENT_CODE	Auto-generated as a concatenation of: Document Name, Timestamp in yyyy-mm-dd-hh24-mi-ss format that is date along with hours (24-hour format, minutes and seconds) of database date and time	Auto-generated as a concatenation of: Document Name, Timestamp in yyyy-mm-dd-hh24-mi-ss format that is date along with hours (24-hour format, minutes and seconds) of database date and time	Auto-generated as a concatenation of: Document Name, Timestamp in yyyy-mm-dd-hh24-mi-ss format that is date along with hours (24-hour format, minutes and seconds) of database date and time	Auto-generated as a concatenation of: Document Name, Timestamp in yyyy-mm-dd-hh24-mi-ss format that is date along with hours (24-hour format, minutes and seconds) of database date and time
ISSUED_DATE	Date when the task was marked as Done	Date when the task was marked as Done	Date when the task was marked as Done	Date when the task was marked as Done
RELATED_OBJECT_NAME	PER_ALLOCATED_TASKS	PER_ALLOCATED_TASKS	PER_ALLOCATED_TASKS	PER_ALLOCATED_TASKS
RELATED_OBJECT_ID_COL	ALLOCATED_TASK_ID	ALLOCATED_TASK_ID	ALLOCATED_TASK_ID	ALLOCATED_TASK_ID
RELATED_OBJECT_ID	Value of allocated task ID	Value of allocated task ID	Value of allocated task ID	Value of allocated task ID
LAST_UPDATE_DATE	Date when the task was marked as Done	Date when the task was marked as Done	Date when the task was marked as Done	Date when the task was marked as Done
LAST_UPDATED_BY	Journey task performer	Journey task performer	Journey task performer	Journey task performer
CREATED_BY	Journey task performer	Journey task performer	Journey task performer	Journey task performer
CREATION_DATE	Date when the task was marked as Done	Date when the task was marked as Done	Date when the task was marked as Done	Date when the task was marked as Done
CREATION_SOURCE	ORA_DOR_API	ORA_DOR_API	ORA_DOR_API	ORA_DOR_API
ATTACHMENTS	Documents uploaded by user	Custom BI Report associated to journey task	Custom BI Report associated to journey task	Custom BI Report sent by HireRight
ATTACHMENT COUNT	<Number of documents uploaded by user>	1	1	1

Points to Consider

- The following attributes aren't populated:
  - PUBLISH
  - PUBLISH_DATE
  - DOCUMENT_NUMBER
  - DATE_FROM
  - DATE_TO
  - ISSUING_COUNTRY
  - ISSUING_LOCATION
  - ISSUING_AUTHORITY
  - COMMENTS
  - Document Records DDF
  - Document Records DFF
- The process of creating document records through journey tasks is secured with the **Manage Person Documentation by Worker** privilege.
- If you have associated document types with your journey tasks, you must include the document types in the Document Type Security Profile of the journey task performer.
- You must not enable approvals for document types that are associated with journey tasks.
- For document types that are associated with journey tasks, you need to ensure that the attributes have the values shown in this table to meet configuration guidelines:

Attribute	Value
Status	Active
Minimum Attachments	Greater than zero
Approval Required	No
Publish Required	No
Restrict Create	No
Document Name	Relevant
Issued On (Date)	Relevant

25 Personalize Journeys

Journey Display Properties

You can control access to a journey section or task action based on role. You can do this by specifying the display property at the journey or task level on the Display Settings tab during journey and task setup.

Let's say you don't want a line manager to mark a task as not applicable on behalf of an employee, you can restrict this by hiding that action at the task level for line manager.

Journey Access Level

The access that each role has for a journey section or task action displays by default. You can change this by specifying the values as indicated in this table. If you don't specify anything, the default access applies.

Values	What it Means
Show	Displays the section or action for the role at the journey or task level.
Hide	Hides the section or action for the role at the journey or task level.
Allow	Enables the role to take action at the journey or task level.

You specify the access for these users:

- Assignee: User to whom the journey is assigned.
- Line Manager: User who is the immediate line manager of the assignee.
- Other User: User other than the assignee and line manager.
- Initiator: User who initiates the transaction.

The display property you set for initiator takes highest precedence, in case there are different properties set for the Assignee, Line Manager, and Other User.

All display property values for the Initiator are the same as that of Other User except for the Order Tasks by Sequence property where the default value is Yes for the Initiator.

Display Property for Initiator User

By default, display properties for Initiator are honored only for the Contextual Journey category. If you want to honor the display properties for a journey category other than Contextual Journey, then you need to create the PER_CHECKLIST_INITIATOR_DISPLAY_PROPS_ENABLED profile option and set the profile value to Y. To do this, follow these steps:

1. Create the profile option by using these steps:
   a. In the Setup and Maintenance work area, search for and click the **Manage Profile Options** task.
   b. On the Manage Profile Options page, in the Search Results area, select **New** on the **Actions** menu.

   c. On the Create Profile Option page, complete all required fields.
   d. Click **Save and Close**.
   e. On the Manage Profile Options page, in the Profile Option Levels section, select these check boxes at the Site level:
      i. **Enabled** – To enable the profile option.
      ii. **Updatable** - To allow users to update privileges.

      The profile values will appear in read-only mode if deselected.
   f. Click **Save and Close**.
2. Enable the profile option that you created by using these steps:
   a. Search for and click the **Manage Administrator Profile Values** task.
   b. Search for the PER_CHECKLIST_INITIATOR_DISPLAY_PROPS_ENABLED profile option code and select the profile option in the search results.
   c. In the PER_CHECKLIST_INITIATOR_DISPLAY_PROPS_ENABLED: Profile Values area, select **New** on the **Actions** menu.
   d. Select **Site** in the **Profile Level** list.
   e. Enter **Y** in the **Profile Value** field.
   f. Click **Save and Close**.
   g. Click **Done**.

These points describe the impact of enabling the profile option:

- All allocated checklists will start honoring the display properties for Initiator.
- The default display property configuration for Initiator will be the same as Other User. If you modify the display property for Line Manager or Other User at the journey level, you will notice a change in behavior for already allocated checklists.
- If the login user is both Line Manager and Initiator, they will be granted a higher level access once the profile value is configured.

Configuration Level

You can see display properties at different levels during setup. Here's what you can configure at each level:

- Journey: Controls access at the journey level. What you specify here overrides the default. Specify the access for the journey assignee, line manager, and others such as HR or IT users.
- Task Type: Controls access for a specific task type at the journey level. The configuration is applicable to all tasks of that type in the journey. You can override this at the individual task level.
- Task: Controls access at a specific task level. What you specify at the task level overrides what's configured at the journey and task type level. Specify the access for the task performer, task owner, line manager, and other users.

The changes you make are specific to a journey or task and not applied globally to all journeys and tasks. You can reset the settings anytime to revert to the default. Also, if you make changes after a journey is assigned, the changes don't affect the assigned journey or task.

Access at the Task Level

You specify the access for these users:

- Performer: User to whom the task is assigned.

- Owner: User who is defined as the task owner.
- Line Manager: User who is the immediate line manager of the assignee.
- Other User: User other than the assignee and line manager.

At the task level, when you configure Task Access it determines what the role can do as part of the task.

Here's what Task Access determines:

- What the role can see on the task details page in the Configurable Form, Questionnaire, or Document task types. For example, if you don't want a line manager or HR specialist to fill a questionnaire or configurable form response on behalf of an employee or allow the line manager or HR specialist to view the responses provided by the employee to a Questionnaire or Configurable Form, you can set the task access to Hide for Line Manager or Other User
- What the role can do in these task types if you specify Hide for Task Access:
  - In the External URL, App Task, I-9, Report tasks the Go to Task button is hidden.
  - In DocuSign tasks, the Sign Here button is hidden.
  - In Native eSignature tasks, the Done button is hidden.
  - It has no impact on manual tasks since you can't restrict access for such tasks.

You can restrict certain journey level actions for the initiator when they self-assign a journey.

How You Rename Journey Task Action Labels

You can rename action labels to make them more meaningful for your business context in the Rename Action Labels section.

For example, you could rename the label **Not Applicable** to **No** in a task.

The **Rename Action Labels** section displays the current labels in journeys. When you provide a new label, it reflects in both journeys and journeys task pages. You can rename an action label or link in all task types. If you want to translate labels, you can do that too.

The labels you can change will vary based upon the task type selected.

- For example, if the task type is External URL, you see the existing label **Go to website**, which you can change, as per your requirement.
- For example, if the task type is Application Task, you see the existing label **Go to application task**, which you can change, as per your requirement.

Examples of Configuring Journey and Task Display Properties

Let's look at some examples of how you use the journey display properties to restrict access to certain areas. You configure the display in the Display Settings tab.

Journey Level

In an off boarding journey, you want to restrict line managers from seeing tasks that need to be completed by other users. You hide the section that lists others' incomplete tasks only for line managers.

You can define the access level for each user as indicated in this table.

Field	Value
Checklist Property	Others' Incomplete Tasks
Property Type	Section
Assignee	Show
Line Manager	Hide
Other User	Show

Let's see another example where you want to restrict line managers and other users from seeing the Contact Us section in an assigned journey. You hide the section only for line managers and other users.

You can define the access level for each user as indicated in this table.

Field	Value
Checklist Property	Contact Us
Property Type	Section
Assignee	Not applicable
Line Manager	Hide
Other User	Hide
Initiator	Show

Here are some points to consider:

- You can control the display of the Contact Us section only on Journeys pages and not responsive checklists and onboarding pages.

- To include the display property changes in assigned journeys, you need to run the **Update Assigned Journey Attributes Based on Modified Journey Template** process.

Task Level

You configure a task of the type questionnaire to collect feedback from employees on their off boarding experience. You don't want this feedback to be visible to the line manager and other users. Therefore, you don't give access to this task to the line manager and other users.

You can define the access level for each user as indicated in this table.

Field	Value
Task Property	Task Access
Property Type	Section
Performer	Allow
Owner	Show
Line Manager	Hide
Other User	Hide

Let's see another example where you want to send reminders for the tasks assigned to an employee as part of their onboarding journey. You want to enable the **Send Reminder** button on the Employee tasks section only for those tasks for which you want to send a reminder. For example, you want to send a reminder to the employee to sign the confidentiality agreement and read and sign the ethics code of conduct. Additionally, you don't want to send a reminder to the employee to review campus map and directions.

To do this, configure the display settings as indicated in this table for these tasks:

- Sign the Confidentiality Agreement
- Read and Sign the Ethics Code of Conduct

Field	Value
Task Property	Send Reminder
Property Type	Action
Performer	Not Applicable
Owner	Show

Field	Value
Line Manager	Show
Other User	Show

Additionally, configure the display settings as indicated in this table for the Review Campus Map and Directions task:

Field	Value
Task Property	Send Reminder
Property Type	Action
Performer	Not Applicable
Owner	Hide
Line Manager	Hide
Other User	Hide

When you select multiple tasks to send reminders, the **Send Reminder** button will only display the count of tasks for which the Send Reminder display setting is set to Show. In this example, the count on the **Send Reminder** button will display 2 even if you have selected all these tasks to send reminders:

- Sign the Confidentiality Agreement
- Read and Sign the Ethics Code of Conduct
- Review Campus Map and Directions

This is because the Send Reminder display setting is set to Hide for the Review Campus Map and Directions task and the same setting is set to Show for the other 2 tasks.

How You Configure the Background Image for a Journey

You can directly upload an image that displays in the thumbnail and background header of a journey.

You can upload an image from these places:

- When you create a journey or journey template in Checklist Templates, you can use Upload in the Message tab.
- When you create a new journey, create a journey from an existing template, or edit a journey in the Journeys app. You can click Add to browse and upload the image in the Background image for this journey section.

The image you upload is stored in Universal Content Management (UCM) server as an attachment. After upload, you can adjust the size and preview the changes before saving the image. You can also add a new image, update or delete an existing image. Once saved, the image appears in a couple of places, like the thumbnail of the journey on the Explore and My Journeys tab and as the background header when you drill-down into the journey.

Say you already specified the Background URL and Thumbnail URL and then upload an image, then the image takes precedence. If you update the background image after you assign a journey, you need to update the image in the journey template setup page and use the Update Assigned Journey Attributes Based on Modified Journey Template process to synchronize the changes.

When you upload an image, keep these points in mind:

- It's recommended that the image file size doesn't exceed 2 MB when adding an image in the Journeys app. A huge file may result in performance issues.
- Ensure the dimensions are appropriate. The default size of the image cropper is 16 x 9.
- If you upload an image in .gif format, then you can’t crop the image.
- During the export or import journey process, image export and import isn’t supported.
- Guided journeys in Responsive pages don't support background images.

How You Configure the Name Format Displayed on Journey Cards

You can configure the display of the journey name on the journey card in a specific format. This helps differentiate the instance each time you assign the same journey.

You can do this configuration in **Display Name Format on Journey Card** on the Message tab during journey template setup.

This table lists the supported tokens you can use in the display name:

Tokens	Description
{Name}	Journey name
{Instance}	Journey instance
{AllocationDate: <format>}	Format of the journey assignment date
{Comments:<count>}	Comments truncated to maximum characters of length

Example:

DISPLAY_NAME_FORMAT = {Name}{Instance} as of : {AllocationDate:MMM dd, YYYY} {Comments:16}

where Name = Vaccination Status, Instance = 1, Allocation Date = Sep 27, 2023 and Comments= First 16 characters of the comment which is Your vaccination details.

the Display Name on the journey card is= **Vaccination Status 1** as of : **Sep 27, 2023 Your vaccination**

If the characters in the comments exceed the count you specify, then the comments are truncated to the specified count.

If you don't configure the format and an additional instance of the same journey is assigned, it displays the name in the format <Journey Name> (Instance Number). You can also translate the static text in the Display Name Format on Journey Card using the translation editor icon on the setup page.

Title for Journey Templates

This table lists the fields used to configure the Title text in different journey category templates and the pages on which it appears.

Attribute	Field Label in Enterprise Onboarding Category	Field Label in Enterprise Onboarding Step	Field Label in Other Categories	Field Label in Survey Category	Where This Text Displays
Welcome Text	Welcome Notification Text	Not available	Text	Welcome Text	This doesn't appear on any of the pages. In Enterprise Onboarding journeys, this text appears as the text in the assigned journey welcome BIP notification.
Title	Welcome Notification Title	Title	Title	Title	This appears on the Journeys page as the title when you drill-down into a specific journey from My Journeys. In Enterprise Onboarding journeys, this text appears as the title of the assigned journey welcome BIP notification.
Subtitle	Not available	Not available	Subtitle	Subtitle	This appears on the Journeys page as the subtitle when you navigate to your assigned journey from My Journeys.

Attribute	Field Label in Enterprise Onboarding Category	Field Label in Enterprise Onboarding Step	Field Label in Other Categories	Field Label in Survey Category	Where This Text Displays
					You can configure the subtitle for all journey categories.

26 Secure Journeys

How You Secure Journey Template Category

You can use Category Security to control what categories users see when creating templates in the Category Security Redwood page and when creating a personal journey in the Journeys app.

For example, you can restrict a line manager to create journeys only of the Compensation category.

When securing the category, you can provide a role access to either of these options:

- Specific categories
- All categories

The Category Security tab isn't available on the classic Checklist Templates page. You need to use the Category Security quick action under My Client Groups > Journeys Setup to access the Category Security Redwood page.

Ensure that the ORA_PER_JOURNEY_SECURITY_ENABLED profile option is enabled.

This table highlights the key points you need to keep in mind when configuring category security.

Security Configuration Option	Where You Configure This	What This Configuration Determines	Which Page is Impacted
Journey Category	My Client Groups **>** Journeys Setup **>** Category Security	Roles that can select this category when creating a journey.	1. Journeys Template setup page when creating global journeys. 2. Create Journeys flow in the Journeys app when creating personal journeys.

Configure Category Security

Follow these steps to configure category security based on a journey template:

1. On the home page, click the **My Client Groups** tab.
2. Under APPS, select **Journeys Setup**.
3. On the Journeys Setup page, click the **Category Security** action.
4. On the Category Security page, click **Create**.
5. Add the details in the New Category panel drawer and click **Save**.
6. Click the **Security** icon for the category you created on the Category Security page.
7. Click **Add**.
8. Select the role and status.
9. Click **Save**.

How You Secure Journey Template Operations

You can use Journey Template Operations on the Security tab during setup to control journey template operations per journey template.

Depending on the access, you provide to a role, users with that role will be able to perform those actions. This table summarizes the key points related to securing journey template operations using a use case:

Security Configuration Options	Where You Can Do This	Configuration Determines	Which Page is Impacted	Use Case
Journey Template	Specific template > Security tab > Journey Template Operations > **Configure Journey** check box	Controls which roles can manage this journey	Checklists Template setup page and Create Journey in Journeys app	Onboarding Journey should only be managed by a HR specialist.
	Specific template > Security tab > Journey Template Operations > **Explore** check box	Determines which roles can view this journey	Explore tab on Journeys app and Allocate Checklists page	Grow Your Career journey should be viewed by employee.
	Specific template > Security tab > Journey Template Operations > **Assign to Self** check box	Controls which roles can assign this journey to themselves	Specific journey from the Explore tab	Employee should be able to self-assign Grow My Career journey.
	Specific template > Security tab > Journey Template Operations > **Assign to Others** check box	Controls which roles can assign this journey to people in their person security profile	Specific journey from the Explore tab and Allocate Checklists page	Line manager should be able to assign Performance Review journey for their team.

Secure Journey Template Operations

You want to configure security for a specific Offboarding Journey template. For this template, you want a HR specialist to be able to perform all operations, but a line manager to perform only certain specific operations.

Based on the configuration you make, users will be able to perform only those configured operations based on their role.

Before You Start

1. Create the Offboarding Journey template.
2. You should select the **Enable data security** check box to enforce security.

Secure the Offboarding Journey Template

1. Go to Setup and Maintenance.

2. Search for and click the Checklist Templates task or quick action.
3. Open the Offboarding Journey template and click the Security tab.
4. In the Journey Template Operations section, add the Human Resource Specialist and Line Manager role.
5. Select the options as indicated in this table for each of the roles.

Configuration Options	Human Resource Specialist Role	Line Manager Role
Enabled	Yes	Yes
Configure Journey	Yes	No
Explore	Yes	Yes
Assign to Self	Yes	No
Assign to Others	Yes	Yes

6. Click **Save and Close**.

When you configure this, here's what happens:

- The Human Resource Specialist can configure the journey template, view this journey on the Explore tab and in List of Vales (LoVs), and assign this journey to themselves and others in their person security profile.
- The line manager can view the journey on the Explore tab and in LoVs and assign this journey to others in their person security profile. A line manager can't configure the journey template and assign this journey to themselves.

How You Secure Assigned Journeys Based on Specific Templates

Secure assigned journeys based on a specific journey template by configuring the options in the Assigned Journey Operations section.

Roles that you enable in this section will be able to view the journeys assigned based on the template. The access when configured takes into account the Person Security Profile and the View Assigned security configuration.

By default, All roles is selected to maintain backward compatibility. However, you can disable the All roles option and add only those roles that should have access to view the journeys assigned based on this template.

The table briefly describes the impact of the configuration options using a use case.

Security Configuration Options	Where You Configure This	What This Configuration Determines	Which Page is Impacted	Use Case
Assigned Journeys	Specific template > Security tab > **Assigned Journey Operations**	Control which roles can view assigned journeys, that are based on this journey, to persons in their person security profile	• My Journeys tab in Journeys app • Assigned Journeys tab in Journeys app	Employee and HR specialist only should be able to view Vaccination Journey, not Line manager.

Security Configuration Options	Where You Configure This	What This Configuration Determines	Which Page is Impacted	Use Case
			• Allocate Checklists responsive page • REST Get method	

Secure Assigned Journey by Template

You want an assigned journey based on a Vaccination Journey template to display for an employee and HR specialist but not for a line manager.

Before You Start

Create the Vaccination Journey template.

Secure Assigned Journeys Based on the Vaccination Journey Template

1. Go to Setup and Maintenance.
2. Search for and click the Checklist Templates task or quick action.
3. Open the Vaccination Journey template and click the Security tab.
4. In the Journey Template Operations section, add the Human Resources Specialist role and enable all the configuration options.
5. In the Assigned Journey Operations section, add the Human Resource Specialist and Employee role and configure the options as indicated in this table.

Configuration Options	Human Resource Specialist	Employee
Enabled	Yes	Yes
View	Yes	Yes

When this journey is assigned, the Human resource specialist can see the journey in the Assigned Journeys tab while the employee can see this journey in their My Journeys tab.

Considerations for Configuring Journey Security

This topic lists the impact of configuring journeys security on various journey template operations:

- Impact of selecting Enable data security in the Security tab:
  - If you activate Enable data security in your existing templates, but don't enable the profile option ORA_PER_JOURNEY_SECURITY_ENABLED for security, then no security is applied at the template level and at the assigned journey level.
  - If the ORA_PER_JOURNEY_SECURITY_ENABLED profile option is set to Y but you don’t select Enable data security in the Security tab of the journey template, then no security is applied at the template level and at the assigned journey level.

- Impact on duplicating a journey:
    - If you duplicate a journey that has security configured, the security configuration is copied as well.
    - If you duplicate a journey template and save it as a personal journey, the journey template and view assigned security details won't be copied. You can still view the personal journey on the Explore tab and take actions such as Assign to Self, Assign to Others, Edit, Delete, and Force Complete of the personal journey.
- Impact on importing and exporting journey template configuration:
    - Any security configuration you make in a journey template can't be exported or imported in the Functional Setup and Manager (FSM). However, you can export or import the template and then reconfigure the security configuration.
    - Security configuration isn't exported or imported when you Export and Import journey templates on the Checklist Template page. However, you can export or import the template and then reconfigure the security.
- To enforce the security configuration you make, the journey template should be active and the ORA_PER_JOURNEY_SECURITY_ENABLED profile option should be set to Y. Additionally, you need to configure the roles for which access needs to be given for a specific action. If no roles are added here, then all roles will have access if security is enabled.
- The security configuration is only applicable to the Journeys app and Allocate Checklists quick action, but not to the Onboarding and Checklist Tasks apps.
- Template level and assigned journey level security configuration isn't supported in HCM Data Loader.
- You can't sync security configuration updates to assigned journeys using the Update Assigned Journey Attributes Based on Modified Journey Template ESS process.
- You can control who can manage the journey template by configuring security for guided journeys. However, you can't control access to UI elements in the guided journey page, such as the **Guide Me** button.
- Users who are granted the ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB role have global access on journey templates. This behaviour is by design. Such users can access a journey template on the Explore tab even if journey security is enabled and their job role isn't configured for access. To remove the global access, follow these steps:
    a. Log in as the user with the ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB role.
    b. Remove the ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB role from the user profile.
    c. Run the **Send Pending LDAP Requests** process.
    d. Once the process is successfully completed, log out and clear the cache and cookies on the browser.
    e. Log in and the user will no longer be able to access the journey template on the Explore tab.

27 Notifications and Reminders

How You Configure Journey Notifications

For more information, refer to this topic: *How do I configure journey notifications?*

Considerations for Journey Notifications

For solutions to common requirements related to journey notification configurations, refer to this topic: *What are the common configuration requirements for journey notifications?*

How You Use Predefined Alert Templates for Journey Notifications

For more information, refer to this topic: *How do I use predefined alert templates for journey notifications?*

Example of Translating Tokens for Journey Alerts

You can display translated token values in the subject and body text of the journey alerts notification in the preferred language of the alert's recipient.

For example, if the user's preferred language is French, you can display the token values in French instead of the default environment base language. This example procedure describes how you can translate the journey name token value to French and display it in the subject and body text of journey alerts notification. To do this, follow these steps:

Create Alert Template in French Language

1. In the Setup and Maintenance work area, search and click the **Manage HCM Alerts** task name.
2. Search and select the ORA_CHK_CHECKLIST_INITIATED alert for which you want the journey name token to be translated.
3. In the **Action** drop-down list, click **Edit**.
4. On the **Templates** tab, click **Add Template**.
5. Enter the alert template name, and select the default language as French.
6. Leave the enabled value as is, and in the **Edit** drop-down list, select **Manage Recipients and Message**.
7. Click **Add Recipient**.
8. Select **Mail** as the communication method, and enter the expression.
9. Leave the format as HTML and enter the subject of the mail alert.
10. Enter the message text for the alert. You can include images, modify the text font, size, color, placement, and so on.

11. Click **Apply**, and then click **Save and Close**.
12. Click the **Translation Editor** icon for the alert template you created, and select the language as **French**.
13. Click **Apply**, then click **Save and Close**.

Translate Journey Name in Alert Recipient Language

1. On the application home page, click the **My Client Groups** tab.
2. Click **Show More** after the list of quick actions.
3. Click the **Checklist Templates** quick action in the Employment area.
4. Click **Create** to enter details of the journey template.
5. Click the **Translation Editor** icon in the page header region.
6. Enter the translated text for the journey name in the French field, and then click **OK**.
7. Click **Save and Close**, and then click **Done**.

Associate Alert Template and Journey

1. Click the **Message** tab.
2. In the **Template for Assigned Checklist** field of the Alert Templates section, select the alert template you created in the Create Alert Template in French Language section of this topic.
3. Click **Save and Close**, and then click **Done**.

After you perform these steps, the alert's recipient (whose preferred language is set as French) will receive the email notification with the journey name token value translated in French once the journey is assigned to them.

Points to Consider

- If you want to display a token value in a language other than the base language, you need to first translate the token value in that specific language. For example, if you use the journey name as a token in your alert, then the journey name must first be translated in the required language on the journey template setup page.
- You need to translate the alert template in the language that you want the alert to be generated in.
- The token values will be translated in the recipient's preferred language at the time the alert is generated. If the preferred language is changed later on, it will not impact the already generated alert content.
- The language used in the current session won't impact the language of the generated alert.

Journey Features with Only Alerts-Based Notification Support

These journey types only send out alerts-based notifications:

- Contextual journeys
- Event-based journeys
- Personal journeys
- Survey journeys

These actions only send out alerts-based notifications:

- Force-complete journeys
- Journey assigned email

You can perform these actions only when the processing mode for the journey template is **Alerts based notification**:

- Associate different notification templates for each task and journey.
- Include task groups in the journey template.
- Personalize the task reminder notification.
- Select the Directs or Organization option for assigning journeys.

How You Use Nudges to Send Journey Reminders

You can configure a nudge to send an email notification to remind the employee or manager when their journey or task isn't complete.

You configure nudges for the Journeys module in the Nudge Configuration work area. After you configure a nudge, the **Process HCM Nudges** scheduled process identifies the person to whom the journey or task reminder needs to be sent.

This table lists the nudge reasons that you can configure for the Journeys module:

Nudge Reason	Input Parameters	Channel Type	Recipient Type	Alert Details
Journeys				
Journey has overdue tasks	Journey Name Number of Days After Journey Is Assigned	Email	Employee Line Manager	Code: ORA_NUDGE_PER_JOURNEY_ALERT Title: Nudge to alert for journeys Description: Nudge when an employee has not taken action on journeys
Journey not completed	Journey Name Number of Days After Journey Is Assigned	Email	Employee Line Manager	Code: ORA_NUDGE_PER_JOURNEY_ALERT Title: Nudge to alert for journeys Description: Nudge when an employee has not taken action on journeys

Nudge Reason	Input Parameters	Channel Type	Recipient Type	Alert Details
Journeys				
Journey not started	Journey Name Number of Days After Journey Is Assigned	Email	Employee Line Manager	Code: ORA_NUDGE_PER_JOURNEY_ALERT Title: Nudge to alert for journeys Description: Nudge when an employee has not taken action on journeys
Task in journey not complete	Journey Name Task Name Number of Days After Task Is Assigned	Email	Employee Line Manager	Code: ORA_NUDGE_PER_JOURNEY_ALERT Title: Nudge to alert for journeys Description: Nudge when an employee has not taken action on journeys

Points to Note

- It's recommended that you enable the **Schedule Nudge Plan** checkbox when you create the nudge plan. By doing this, you can avoid manually scheduling journey reminders.
- The nudges can only be sent through the email channel to the employee and line manager.
- For the **Task in journey not complete** nudge, the nudge email is only sent to the journey assignee and their manager. This is done even if the performer is someone other than the journey assignee or their manager.
- You can obtain the journey and task code that are used to configure nudges from the checklist template page.
- You can configure nudges only for the Enterprise Onboarding journey, and not for step journeys.
- Nudges by design are supported for employees and contingent workers only.
- Nudge email alerts are only sent to the work email addresses of the recipient. They won't be displayed in the worklist or bell notifications for the recipient.

Example of Configuring a Nudge to Send Journey Reminders

You can configure a nudge to send an email notification to remind the employee or manager for one of these nudge reasons:

- Journey has overdue tasks
- Journey not completed
- Journey not started
- Task in journey not complete

For example, you can configure a nudge to send a reminder when the journey isn't completed. To do this, follow these steps:

Create Nudge Plan

1. On the Home page, click the **My Client Groups** tab.
2. Click the **Nudge Configuration** quick action under the Employment category.
3. Click **Add** and enter the nudge plan details.
4. Select the **Schedule Nudge Plan** checkbox. It's recommended that you select the checkbox when you create the nudge plan. By doing this, you can define the period for which the nudge needs to be scheduled.
5. Set the status to **Active**, and then click **Save**.

Configure Nudge Type

1. Click **Add** in the Nudges section.
2. Select **Journeys** in the Module list.
3. Select **Journey not completed** in the Reason list.
4. Edit the default configuration name, as applicable.
5. Set the status to **Active**.
6. Select the journey name and the corresponding task name in the journey.

   Task groups aren't displayed in the Task Name list of values (LoV). Instead, all tasks in the task group will be displayed in the LoV. For an enterprise onboarding journey, all tasks that are part of the steps in the journey will be displayed.
7. In the **Number of Days After Journey Is Assigned** field, enter the number of days after the journey assigned date by when the nudge must be triggered.

Enter Channel Details

1. Click **Add** in the Channels section.
2. Select **Email** in the Channel Type section. The Active checkbox is selected by default.
3. Select the recipient type (**Employee** or **Line manager**).
4. Select the content source.
5. Enter the email title and content based on the content source you selected.

6. Click **OK**.
7. Click **Save and Close**.

Schedule Nudge Period

1. Click **Add** in the Schedule section. This section is displayed only if you selected the **Schedule Nudge Plan** checkbox while creating the nudge plan.
2. Enter these details:
    a. Select the date when you want email notification to start.
    b. Select the frequency that you want to repeat the notification (**Day**, **Week**, **Calendar month**, or **Year**). Based on the value you select, you need to specify the details. For example, if you select **Week**, you need to select the day of the week that you want to repeat.
    c. Select the value for ending the recurrence of the notification (**Specific date** or **Number of occurrences**). If you select **Specific date**, you need to select the end date of the recurrence. If you select **Number of occurrences**, you need to enter the value for the number of occurrences after which the recurrence will end.
    d. Select the number of runs per nudge period (**Once per period** or **Every day of the period**).

Period Summary

1. Verify the period details in the Period Summary section.
2. If you don't want to send the email notification for a particular period, you can make the period inactive by editing the period to clear the **Active** checkbox. The application will skip sending the email notification for the inactive period and will continue with next period.

Journey Notifications for Pending and Terminated Workers

All email notifications from Cloud HCM are sent to the user account email address. The user account email address is populated from the email address specified as Work in the person record.

Typically, pending workers don't have a corporate email address. Preboarding email notifications are sent only to the email address specified in the user account. So, for pending workers to receive email notifications on their Home email, you can enable either one or both of these profile options:

- ORA_PER_CHECKLIST_NOTIFY_HOME_EMAIL
- ORA_PER_USER_ACCOUNT_NOTIFY_HOME_EMAIL

This table shows the differences between the journey and user account notifications based on different criteria.

Criteria	Journey Notifications	User Account Notifications
What's the profile option code?	ORA_PER_CHECKLIST_NOTIFY_HOME_EMAIL	ORA_PER_USER_ACCOUNT_NOTIFY_HOME_EMAIL
What's the default value of the profile option?	N	N

Criteria	Journey Notifications	User Account Notifications
Which notifications are impacted?	Journey and task notifications	Notifications that are a part of the password lifecycle process. The notifications are related to these events: • Forgot username • New user created • Password expired • Password expiry warning • Password generated • Password reset confirmation • Password reset
Which home email is used?	The one marked as H1 in the application. If there's more than one H1 email specified, the application uses the first H1 email returned in the search. It's better to use only one H1 email address for pending workers so that journey notifications are consistently sent to the same home email.	The one marked as H1 in the application. If there's more than one H1 email specified, the application uses the H1 email that is valid as of the system date and was created last in the application.
How is the notification sent?	If you set this site-level profile option to Y, journey email notifications are sent to the home email address of the journey assignee. Additionally, the email notification is sent to their user account email, if it exists. If there is no email of type H1 and no user account email, then no email notification is sent.	If you set this site-level profile option to Y, user account email notifications are sent to the home email address of the user. If there is no email of type H1, then the email notification is sent to the user account email. If there is no user account email as well, then no email notification is sent.
Are there any dependencies?	Yes. The journey and task email notifications are sent to the home email. The notifications are sent if the user meets these conditions on the date the journey and tasks are assigned: • Has only an active pending worker work relationship. • Has only terminated work relationships. That is, no active work relationships of type employee or contingent worker. In all other cases, the email notification is sent to the user account email. If there is no user account email, then no email notification is sent. A worker can't take any action (mark complete or not applicable) from the notification they receive on the home email. This is because such emails aren't actionable and won't have actionable links.	Yes. The user account email notifications are sent to the home email. The notifications are sent if the user meets these conditions on the system date: • Has only an active pending worker work relationship. • Has only terminated work relationships. That is, no active work relationships of type employee, contingent worker, or nonworker. In all other cases, the email notification is sent to the user account email. If there is no user account email, then no email notification is sent.

28 Preboarding

How You Enable Sending Journey Notifications to Personal Email

All email notifications from HCM cloud are sent to the user account email address. User account email address is populated from the email address specified as Work in the person record.

This configuration is applicable to journeys.

Typically, pending workers don't have a corporate email address. Preboarding email notifications are sent only to the email address specified in the user account. So, for pending workers to receive email notifications on their Home email, you can implement one of these options:

- Use the ORA_PER_CHECKLIST_NOTIFY_HOME_EMAIL profile option. By default, this profile option is set to N. If you set this site-level profile option to Y, journey email notifications will be sent to the pending worker's home email address in addition to their user account email address. The home email used in this case is the one marked as H1 in the application. Here's how the notifications are sent:
  - If the profile option is set to Y and the pending worker has both home and user account email addresses specified, then the notification is sent to both the email addresses.
  - If the person has an active employee or contingent worker assignment on the date the task is initiated, the notification is always sent to the user account email and isn't sent to their home email.
  - If there's more than one H1 email specified, the application uses the first H1 email returned in the search. It's better to use only one H1 email address for pending workers so that journey notifications are consistently sent to the same home email.
- Specify the pending worker's home email address as their work email address in their person record. After the pending worker becomes an employee, you will need to replace the user account email address, in the Security Console, to the corporate email address from the personal email address.

If a worker is terminated and has no active work relationship with the enterprise, then the notification will be sent to the worker's personal email address.

How You Enable Access to Journeys for Preboarding

You must give the necessary access to new hires so that they can access their preboarding tasks before their start date. There's no separate work area for preboarding. They do these tasks in the Onboarding work area.

Provide Access

When you create a pending worker, their user credentials are automatically generated. Based on how you configure the email template in the Security Console, a notification with the credentials goes to either the new hire or their manager. If the manager gets the notification, they can forward the details to the new hire.

Since a pending worker work relationship is created as nonprimary by default, the user account process doesn't retrieve the assignment details including the manager details for the pending worker. As a result, the manager notifications for a pending worker aren't generated.

You need to do either of these additional tasks if you use the Single Sign-on (SSO) mode for authentication:

- Enable the SSO Chooser feature, which allows pending workers to be authenticated.
- Create an SSO account in the corporate LDAP and share the details with the new hires.

If you use VPN or IP allow listing for authentication, you need to give necessary privileges to pending workers so that they can access the application.

Grant Roles

You need to grant new hires the Pending Worker role that contains the Manage Onboarding by Worker privilege. Alternatively, you may create a custom role that's a copy of the pending worker role and add more privileges.

Here's an example to illustrate how you can create a custom role that's a copy of the Pending Worker role and grant access to document records for pending workers so that they can attach and upload documents.

1. Copy the existing pending worker role.
   a. In Tools > Security Console, click **Copy Role** for the existing pending worker role and select **Copy top role and inherited roles** and then click **Copy Role**.
   b. In the Copy Role: Basic Information page, enter the role name Pending Worker Document Records.
   c. Enter the role name without spaces in the Role Code field.
   d. Add the required description.
2. Add the required functional security privileges, data security policies, aggregate privileges, duty roles and submit the role.
   a. In Setup and Maintenance, search for the Manage Data Role and Security Profiles task. Search for the role that you created and assign the security privileges and submit the role.

Privilege Type	Privileges and Policies
Functional Security Privilege	- Access Quick Actions - Use REST Service -HR Document Types List of Values
Data Security Policies	- Public Person
Aggregate Privileges and Duty Roles	- Attachments User - Manage Person Documentation by Worker - Use REST Service - HCM Countries List of Values Duty Role - Use REST Service - HR Document Types List of Values

3. Assign the pending worker document records role to users.
4. Run the Retrieve Latest LDAP Changes process to make the new role available in HCM. Use the Scheduled Processes work area to run the latest changes.
5. When a user with the previously assigned custom pending worker role signs into the application, they should now be able to add document records.

29 Deep Links in Journeys

Deep Links in Journeys

You can use deep links to open specific Journeys pages without navigating through the menu structure. Users can simply click those links to go directly to the application pages they need to use, without any more clicks or navigation.

Parameters

You can find all the available deep links in the Deep Links work area. Some deep links, such as those assigned the NONE action, are ready to use as is. Other deep links, such as those assigned the VIEW action, require you to edit the link details before you can use them. This table summarizes the different parameters used across multiple deep links.

Parameter	Type	Description
tab	String	The tabs that appear on the Journeys app.
searchTerm	String	Search string. Search terms will vary based on the tab being referenced.
pageName	String	The only values supported are **`exploreJourneys`**, **`myJourneys`**, and **`journeyDetails`**.
category	String	Category of the journey. For example, ONBOARD, ORA_PERSON, ORA_SURVEY and so on. If category parameter isn't passed, journeys of all categories are displayed.
subCategory	String	Lookup code for the Survey Subcategory lookup. These are the only values supported for the subcategory parameter when the category parameter is ORA_SURVEY. • ORA_CHK_TOUCHPOINT_SURVEY • ORA_CHK_GENERAL_SURVEY
status	String	These are the only values supported for the Status parameter. • ORA_OPEN - indicates all open assigned journeys. • ORA_CLOSED - indicates all completed assigned journeys. If Status parameter isn't passed, both open and completed assigned journeys display.
journeyCode	String	Unique alphanumeric identifier for the journey template. This is auto generated based on the journey name when the journey template is

Parameter	Type	Description
		created and displayed in the journey template page.
journeyId	Number	Unique numeric identifier for the journey template.
checklistCode	String	Unique alphanumeric identifier for the journey template. This is auto generated based on the journey name when the journey template is created and displayed in the journey template page.
checklistStatus	String	These are the only values supported for the Status parameter. • ORA_OPEN - indicates all open assigned journeys. • ORA_CLOSED - indicates all completed assigned journeys. If Status parameter isn't passed, both open and completed assigned journeys display.
personal	String	This parameter controls the rendering of the **Personal** filter chip on the Explore tab in journeys. These are the only values supported for the personal parameter: • True – If the parameter value is set to true, the **Personal** filter chip is selected by default when you visit the Explore tab on journeys for the first time. • False - If the parameter value is set to false, the **Personal** filter chip isn't selected when you visit the Explore tab on journeys for the first time. • Hide - If the parameter value is set to hide, the **Personal** filter chip is hidden when you visit the Explore tab on journeys for the first time. If any of the parameter values is passed, then it's honored. If no value is passed, then the Personal filter chip is applied by default.
`showCreate`	String	This parameter controls the rendering of the **Create Journey** button on the Explore tab in journeys. These are the only values supported for the `showCreate` parameter: • True - If the parameter value is set to true, the **Create Journey** button is displayed on the Explore tab in journeys. • False - If the parameter value is set to false, the **Create Journey** button isn't displayed on the Explore tab in journeys.

Deep Links by Use Case

This table lists the deep links by use case. Replace the <server_host> with details of your pod.

Deep Link	Purpose	Parameters
https://<server_host>/fscmUI/redwood/worker-journeys/journey?tab=<tab_name>	Go to a specific tab in Journeys. For example, create a landing page deep link that shows all journey templates on the Explore tab	tab=<tab_name> • tab=explore • tab=myJourneys • tab=myTasks • tab=assignedJourneys • tab=activity
https://<server_host>/fscmUI/redwood/worker-journeys/journey?tab=<tab_name>&searchTerm=<search_terı	Land on a specific tab with the search prepopulated with the searchTerm parameter value. For example, create a landing page deep link that shows all journey templates on the Explore tab where journey name starts with 'Onboard'.	searchTerm=<search_term> • For Explore tab, searchTerm parameter value supports journey name • For My Journeys tab, searchTerm parameter value supports journey name • For My Tasks tab, searchTerm parameter value supports task name • For Assigned Journeys tab, searchTerm parameter value supports journey name or person name • For Activity tab, searchTerm parameter value supports journey name This parameter works only with the tab parameter.
https://<server host>/fscmUI/redwood/worker-journeys/journey/journey-redirect?pageName=exploreJourneys&category=<Ca https://<server host>/fscmUI/redwood/worker-journeys/journey/journey-redirect?pageName=exploreJourneys&category=<Ca	Land on a specific tab with journeys filtered by a specific category or a subcategory.	pageName=exploreJourneys This pageName parameter works only with parameter of category=<Category_Code> or subCategory=<Subcategory_code>
https://<server host>/fscmUI/redwood/worker-journeys/journey/journey-redirect?pageName=myJourneys&category=<Category https://<server host>/fscmUI/redwood/worker-journeys/journey/journey-redirect?pageName=myJourneys&category=<Category https://<server host>/fscmUI/redwood/worker-journeys/journey/journey-redirect?pageName=myJourneys&category=<Category	Directly list assigned journeys of a specific category, subcategory, journey code and statuses for the signed-in user on the My Journeys tab.	pageName=myJourneys This pageName parameter works only with parameters of category=<Category_Code> or subCategory=<Subcategory_code> or status=<Status_Code> or journeyCode=<Journey_Code>

Deep Link	Purpose	Parameters
4. `https://<server host>/fscmUI/redwood/worker-journeys/journey/journey-redirect?pageName=myJourneys&category=<Categor` 5. `https://<server host>/fscmUI/redwood/worker-journeys/journey/journey-redirect?pageName=myJourneys&journeyCode=<Jour` 6. `https://<server host>/fscmUI/redwood/worker-journeys/journey/journey-redirect?pageName=myJourneys&journeyCode=<Jour`		
1. `https://<server_host>/fscmUI/redwood/worker-journeys/journey/journey-redirect?pageName=journeyDetails&journeyCode=<`	Directly view details of a specific journey and use the allowed actions to assign the journey to themselves or to others	pageName=journeyDetails This pageName parameter works only with parameter of journeyCode=<Journey_Code>
1. `https://<server_host>/fscmUI/redwood/worker-journeys/journey/journey-details?journeyId=<Journey_id>`	Directly view details of a specific journey and use the allowed actions to assign the journey to themselves or to others.	journeyId=<Journey_id>
1. `https://<server_host>/fscmUI/faces/deeplink?objType=EMP_CHECKLIST&action=NONE&objKey=checklis Code>` 2. `https://<server_host>/fscmUI/faces/deeplink?objType=EMP_CHECKLIST&action=NONE&objKey=checklis Code>;checklistStatus=<Status_Code>`	View the latest assigned journey of a specific recurring journey or survey	checklistCode=<Journey_Code> checklistStatus=<Status_Code>
1. `https://<server_host>/fscmUI/redwood/worker-journeys/journey/journey-redirect?pageName=exploreJourneys&category=ONB`	Directly view the Explore tab on journeys without the **Personal** filter chip applied when you visit the page for the first time.	pageName=exploreJourneys category=ONBOARD personal=false
1. `https://<server_host>/fscmUI/redwood/worker-journeys/journey/journey-redirect?pageName=exploreJourneys&category=ONB`	Directly view the Explore tab on journeys without the **Create Journey** button being displayed when you visit the page for the first time.	pageName=exploreJourneys category=ONBOARD showCreate=false

30 Archive and Purge Assigned Journeys

Archive and Purge Assigned Journeys

You can archive or purge assigned journeys, which are in terminal status such as Completed, Error, Expired, or Withdrawn, after a certain period.

- Archive retains a copy of the assigned journeys for audit, data retention or analysis, and other purposes. The data is archived onto a set of archive tables.
- Purge removes the archived journeys from the archive tables and permanently deletes the data.

Here's what the archive process does:

- Evaluates assigned journeys for archive based on a positive archive offset and if the completion date has passed by those many months.
- Moves all assigned journey data to the archive tables.
- Deletes all the moved data from the assigned journeys table.

And here's what the purge process does:

- Evaluates archived journeys for purge based on a positive purge offset and if the archived date has passed by those many months.
- Deletes all that data from journey archive tables, just retaining a single assigned journey entry, marked with the purged date.

Data that's Not Archived or Purged

The data associated with the assigned journey is archived and purged. However, these items associated with the assigned journey tasks aren't archived or purged:

- Document records
- Questionnaires
- Attachments
- Reports used for eSignature journey tasks

The items that aren't archived or purged are retained in the respective tables in the database.

How You Archive and Purge Assigned Journeys

You can periodically archive and purge assigned journeys in terminal status such as **Completed**, **Errored**, **Expired**, and **Withdrawn**. Before you archive and purge, you can force close incomplete journeys and delete unwanted journeys.

You can use the Archive and Purge Journey Data process and select the relevant cleanup mode. There are two ways in which you can archive and purge assigned journeys:

- Automatically
- Manually

Automatic Run

The Process HR Checklist and Tasks process that runs daily initiates the Archive and Purge Journey Data process. The daily run is applicable for journeys assigned from 22A and the process evaluates the eligibility of the journeys for archival and purge based on the duration configured in the Archive After Months and Purge After Months fields during journey template setup. Although the default duration considered for archive and purge is 12 months, you can change it.

You can't pause or cancel the Archive and Purge Journey Data process that's scheduled to run automatically. You can only reconfigure the process to match data retention policies unique to your organization. The reconfiguration can be done using the profile options or the journey template-level fields.

Manual Run

You need to run the Archive and Purge Journey Data process manually. The manual run is applicable for journeys assigned prior to 22A.

To run the process specify the values for the parameters listed in this table.

Parameter	Description
Checklist Name	Name of the checklist, which needs to be archived or purged.
Number of Months	Duration to consider for archive and purge. If you don't pass the number of months while running the process, then the default value of 12 months specified in the ORA_PER_JOURNEY_ARCHIVE_DURATION and ORA_PER_JOURNEY_PURGE_DURATION profile options will be considered.
Cleanup Mode	• Archive • Archive and Purge (This mode is considered only in the automatic daily run and not in the manual run) • Delete ◦ Checklist Name: Name of the checklist. ◦ Allocation Start and End Date Range: The duration to consider when deleting assigned journeys. • Force complete ◦ Checklist Name: Name of the checklist. ◦ Allocation Start and End Date Range: The duration to consider when force completing assigned journeys. ◦ Force Completion Date: Date on which to force complete the journey. • Purge

Although for journey templates created prior to 22A, archive and purge duration won't be mandatory, if you edit the templates, the archive and purge fields become mandatory.

Here are a few points to consider:

- You need to force complete any incomplete assigned journey before you run the Archive and Purge Journey Data process.
- It's recommended to use a force completion date that's earlier than the purge duration.
- If the force completion date is the same or earlier than the Allocation Start Date then the force completion date defaults to the Allocation Start Date.
- During archive or purge, all tasks within the journey are also archived or purged even if the tasks are pending or open.
- When the Archive and Purge Journey Data process is run automatically or manually, it first considers the duration configured in the **Archive After Months** and **Purge After Months** fields on the checklist template setup page. If you don't specify any duration in these fields, then the process considers the duration configured in the ORA_PER_JOURNEY_ARCHIVE_DURATION and ORA_PER_JOURNEY_PURGE_DURATION profile options.

Examples of Assigned Journeys Archive and Purge

Let's look at some examples of how assigned journeys are evaluated for archive and purge during the daily run of the Archive and Purge Journey Data process.

Example 1

Archive a completed journey with 5 months as archive duration. The date of the process run is 28-Sep-2023. The process evaluates the eligibility by considering 5 months prior to the date of the process run, which is Apr-2023. The evaluation date for archive is 1-Apr-2023. Since this date is after the completion date of 10-Mar-2023, the journey is archived.

Allocated Journey ID	Archive Duration	Purge Duration	Completion Date	Date of Evaluation for Archive	Outcome
A1	5	12	10-Mar-2023	01-Apr-2023	Will be archived

Example 2

Archive a completed journey with 12 months as archive duration. The date of the process run is 28-Sep-2023. The process evaluates the eligibility by considering 12 months prior to the process run, which is 28-Sep-2022. The evaluation date for archive is 1-Sep-2022. Since this date is before the completion date, the journey won't be eligible for archive.

Allocated Journey ID	Archive Duration	Purge Duration	Completion Date	Date of Evaluation for Archive	Outcome
A2	12	12	28-Sep-2022	1-Sep-2022	Won't be archived

In these examples, let's see how archived assigned journeys are evaluated for purge.

Example 3

Purge a completed journey with 12 months purge duration. The date of the process run is 28-Sep-2023. The process evaluates the eligibility by considering 12 months prior to the process run, which is 28-Sep-2022. The archive date is 1-Jan-2022 and the evaluation date for purge is 1-Sep-2022. Since this date is after the archive date, the journey is eligible for purge.

Allocated Journey ID	Archive Duration	Purge Duration	Archive Date	Date of Evaluation for Purge	Outcome
A1	5	12	01-Jan-2022	01-Sep-2022	Will be purged

Example 4

Purge a completed journey with 12 months purge duration. The date of the process run is 28-Sep-2023. The process evaluates the eligibility by considering 12 months prior to the process run, which is 28-Sep-2022. The date of evaluation for purge is 1-Sep-2022 and since this date is ahead of the archive date of 28-Sep-2022, it doesn’t meet eligibility and won’t be purged.

Allocated Journey ID	Archive Duration	Purge Duration	Archive Date	Date of Evaluation for Purge	Outcome
A2	12	12	28-Sep-2022	01-Sep-2022	Won't be purged

31 Oracle Search for Journeys

How You Enable Oracle Search for Journeys

Oracle Search can search fast across large volumes of data and return highly relevant results. To enable Oracle Search for journeys, refer to this playbook: *How do I enable Oracle Search for journeys?*

32 Create and Use Journeys

How You Create Journeys

Journeys comprise a set of tasks that help automate routine or special processes effectively in your organization. For example, you might want to create a special journey to help employees on their return to the workplace, post the pandemic.

As a line manager or HR specialist, you can use an existing journey as is, create a new journey, or use generative Artificial Intelligence (AI).

Use an Existing Journey

As the first step, you can first look for an existing journey using the Explore tab. When you find one that fits your requirements, you can review it's details and assign it to other people or to yourself.

If you find an existing journey that needs some changes, you can create a copy and modify it. You can change attributes such as the journey description, category, title, and add tasks that are relevant to the journey or update and delete tasks. When you save this duplicate journey, it's saved as your personal journey.

Create a New Journey

If a journey doesn't match your requirements or if your search for a journey doesn't return results as expected, you can use Create Journey to create a brand new journey. You can specify all relevant details for the journey including the tasks. The new journey is saved to your personal journeys list and can be assigned to others and yourself as required.

Personal journeys can't be viewed or managed from the Checklists Templates setup page.

Use Generative AI (GenAI)

You can use the AI Assist option to create relevant journeys and tasks. This option can shorten the time needed to create journeys and its related tasks. For example, you can suggest tasks related to these journeys: on boarding, off boarding, transfer, and career development. You can create a new journey and add tasks or add additional tasks to an existing journey.

Here are some points to consider:

- This capability is available only in Redwood pages.
- By default, tasks are created of type Manual Task with the Worker as task performer and Initiator as task owner.
- By default, the AI Assist option is hidden out-of-the-box. To display the option, you need to enable the **Show AI Assist** Visual Builder constant (VB constant) by using VB Studio.
- AI-generated journeys and tasks are always created in the English language. Additional language support is planned for a future release.
- The journeys and tasks that you generate by using AI may contain inaccuracies. You need to review the journeys and tasks before you activate them.
- GenAI doesn't reference journeys and tasks that are already configured in your environment to suggest new journeys and tasks.

- You can use GenAI to suggest additional tasks in your existing journey template.

Personal Journeys

For more information, refer to this topic: *What are personal journeys?*

How You Use Journeys

You can see and act when you access the different tabs in the Journeys app, based on your role. For more information, refer to this topic: *How can I use journeys?*

How You Assign a Journey to Multiple People

You can assign a journey to a person, all direct reports of a person, or the entire organization of a person.

You can assign the journey to one of these assignee types:

- Person (default option): Here you select a single person.
- Directs: You select a single person and the journey is assigned to the direct reports of the selected person. Directs includes all workers who have a direct reporting relationship of type Line Manager with the selected person.
- Organization: You select a single person and the journey is assigned to the selected person's organization, which includes the entire management hierarchy. Organization includes all workers who have a direct or indirect reporting relationship of type Line Manager with the selected person.

You can make any of these person-based selections:

- Single person.
- Multiple people you select individually.
- Multiple people you select as part of the selected person's direct reports.
- Multiple people you select as part of the selected person's organization.
- Combination of all the scenarios using the Add Assignee option.

You can select multiple persons from the user interface only by using one of the multiple selections mentioned above.

Let's see an example of how the journey is assigned when you select different assignee types. This table shows the population for whom the journey is assigned in each case.

Assignee Type	Selected Person	Population for whom Journey is Assigned
Person	Bala Gupta	Journey is only assigned to Bala.

Assignee Type	Selected Person	Population for whom Journey is Assigned
Directs	Bala Gupta	Bala has 14 direct reports. In this case, the journey is assigned to all 14 direct reports of Bala.
Organization	Bala Gupta	Bala's organization has 4686 people that includes the entire management hierarchy. In this case, the journey is assigned to all 4686 people in the organization.

For more information, see this topic: *What happens if you select multiple workers when assigning a journey?*

Example of Delegating Access for Journeys and Tasks

For more information, refer to this topic: *How do I delegate access for journeys and tasks?*

33 Analyze Journey Errors

How You Troubleshoot Journey Issues

To debug and resolve issues in journeys, refer to this topic: *How do I troubleshoot journey issues?*

How You Analyze Journey Errors

You can analyze and collect diagnostic data for journey errors.

If your journey has errors, use this procedure to analyze and collect diagnostic data for it:

1. Upload the step-by-step screenshots of the journey issue into a Microsoft Word document named STEP_BY_STEP_ACTIONS.docx.
2. Run the HCM Checklist Error Analysis Report to analyze any issues for the journey and upload the report to the service request. To do this, follow these steps:
    a. On the application Home page, click the **Settings and Actions** icon (user name or image) in the global header region, and then click **Run Diagnostics Tests** in the Troubleshooting area. The Diagnostic Dashboard page is displayed.
    b. Search for the **HCM Checklist Error Analysis Report** test name in the **Search for Tests** section. Select the test name check box from the search result and click **Add to Run**. This will add the test to the **Choose Tests to Run and Supply Inputs** section.
    c. Add the input parameters by clicking the **Click to Supply or Edit Input Parameters** icon under the **Input Status** column in the **Choose Tests to Run and Supply Inputs** section. A dialog box is displayed that allows you to enter the input values you want.
    d. Select the check box under the **Include** column for the Checklist Category. Search and select the journey category for which you want to run the report in the box under the **New Value** column.

       The Checklist Category is a user-extensible lookup. If you have defined custom lookup codes, then you need to enter the lookup code in the box.
    e. Select the check box under the **Include** column for the Checklist Name. Enter the assigned journey name for which you want to run the report in the box under the **New Value** column. Ensure that there are

no blank spaces when you enter the parameters. The Checklist Category, Checklist Name, and Person Number are required input values.

f. Select the check box under the **Include** column for the Person Number. Enter the person number for whom the journey is assigned in the box under the **New Value** column.
g. Click **OK** in the dialog box.
h. Enter a relevant run name, such as the person number for whom you're running the report in the **Run Name** box, and then click **Run**. Click **OK** in the Test Run Submitted dialog box.
i. Click the **Display Latest Test Run Status Information** icon in the Diagnostic Test Run Status section.
j. Expand the folder with the run name that you entered in step 2h. Verify if the **Completed** status is displayed under the **Execution Status** column for both the folders.
k. Click the **View Test Results** icon under the **Report** column for the **HCM Checklist Error Analysis Report** folder. The error report for the journey is displayed. Scroll down and check the details, such as profile options and journey tasks.
l. Save the report in a location on your computer. Right-click the report and then click **Save Page As**. Ensure that the Save as type is **Web Page, complete**. Ensure that the report you save is in HTML or MHTML format.
m. Review the report to verify that no data is truncated.

3. Export the journey template. To do this, follow these steps:
   a. On the application Home page click the **My Client Groups** tab.
   b. Click **Show More** under QUICK ACTIONS.
   c. Click the **Checklist Templates** quick action in the Employment area.
   d. Search and select the journey. From the **Actions** drop-down list, click **Export**.
   e. Save the journey in the same location on your computer that you saved the error report. You can save the journey with the person number in case you have multiple reports.
4. You can now upload the STEP_BY_STEP_ACTIONS.docx file, along with the exported journey template and HCM Checklist Error Analysis Report to the service request.