

Oracle® Cloud

Manage Uniform Requests



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Preface

This document describes how to install, configure, and run this recipe in Oracle Cloud Infrastructure Process Automation.

Topics:

- [Documentation Accessibility](#)
- [Diversity and Inclusion](#)
- [Related Resources](#)
- [Conventions](#)

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Related Resources

For more information, see these Oracle resources:

- Oracle Cloud Infrastructure Process Automation documentation in the Oracle Cloud Library on the Oracle Help Center.
- Oracle Cloud at <http://cloud.oracle.com>.

Conventions

The following text conventions are used in this document.

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

About This Recipe

Use this recipe to manage uniform requests from employees through Oracle Cloud Infrastructure Process Automation and Oracle HCM Cloud.



Note:

The recipe is meant only for guidance and is not warranted to be error-free.

Overview

This recipe demonstrates how you can use an Oracle Cloud Infrastructure Process Automation task in the Journeys feature of Oracle HCM Cloud to manage uniform orders from employees.

To run the recipe, you must create a process application using the recipe, and configure the roles and other resources of the recipe. When a manager assigns an HCM Journey (containing a process task to order the uniform) to an employee, the process flow of the recipe is triggered. It notifies about the task to the employee, who then places the uniform request through a form. Now, the process flow directs the request to a group of individuals for approval. If the request is approved, the process can communicate the uniform order to an external system (for example, an SCM system) for the order fulfilment. For this, you'll have to configure a connector to the third-party system. Finally, a confirmation message is sent to the employee's email address.

System and Access Requirements

- Oracle Cloud Infrastructure Process Automation, Version 23.12 or higher, SKUs: B94926 and B94927
- Oracle HCM Cloud, Version 23C or higher
- An account on Oracle HCM Cloud with the `Manage Journey By HR` role.

2

Perform Prerequisite Tasks

You must perform the following configuration tasks on your Oracle Identity Cloud Service (IDCS) and Oracle HCM Cloud instances in order to successfully run the recipe.

Configure Oracle Identity Cloud Service

You must assign predefined application roles to users or groups in IDCS to allow them to work with Oracle Cloud Infrastructure Process Automation.

On your IDCS instance, perform the following tasks:

- Assign IDCS application roles
- Create the required users in IDCS (`fa_hcm_journey_admin`)

For details, see [Manage Access and Assign Roles](#).

Configure Oracle HCM Cloud

To access the Oracle HCM Cloud instance from Oracle Cloud Infrastructure Process Automation, you'll require a user account with certain permissions on Oracle HCM Cloud.

On your Oracle HCM Cloud instance, perform the following tasks:

1. Create a new user account. Make a note of the user name and password you set for the account. You'll use the credentials of this user account in the connector in Oracle Cloud Infrastructure Process Automation.
2. Assign the `Workers` and `User Account` privileges to this user. See [REST API for Oracle Fusion Cloud HCM](#).

3

Select and Configure the Recipe

On your Oracle Cloud Infrastructure Process Automation instance, create a process application using the recipe to deploy and configure the recipe's resources.

1. On the Designer home page, click **Create**. In the Create application pane, select **Create application from recipe**.
2. Find the recipe of your choice, then click **Select**.
The Create application from recipe pane opens.
3. Review the name, version, and description for the application, and click **Create**.
The process application's main page opens, displaying all the resources of the recipe. Configure the following resources before you activate and run the application.

Configure Roles

1. Click the **Roles** tab to view the roles present in the process application. The following roles are displayed:
 - **Employee**: Users that place the uniform requests.
 - **Approver**: Users that approve the requests.
 - **Process User**: Users that initiate the process in Oracle HCM Cloud.
2. Assign the right users to each role.
 - a. Click a role to open the page that lists the users, groups, and permissions for the role.
 - b. Delete the default users assigned, if any.
 - c. In the **Search by** drop-down field, select **Users**.
 - d. In the **Search for users or groups** field, search and select a user.
The user you select is added to the role.
 - e. Select the necessary permission for the user in the Application Permission Level section.




Note:

- For the Process User role, add the `fa_hcm_journey_admin` user corresponding to your instance, and assign the **Use** permission.
- For the Employee role, you may not add any users as the assignment happens dynamically.

3. To return to the process application's main page, click the application's name in the breadcrumb.

Configure the Oracle HCM Cloud Connector

Configure the connection details for the Oracle HCM Cloud connector.

1. Click the **Connectors** tab, and then click the **Oracle HCM Cloud** connector. The connector details page opens.
2. Click **Properties**  from the side menu, and perform the following actions in the Properties pane:
 - a. Review and edit the name and description of the connector, if necessary.
 - b. Enter the URL of your Oracle HCM Cloud instance in the **Base URL** field.
 - c. Close the pane to save changes.
3. Click **Security**  from the side menu, and perform the following actions in the Define Security pane:
 - a. Click **Edit**  to define a security policy for the connector.
 - b. In the **Security Type** field, select **Basic Auth** from the drop-down list.
 - c. In the Basic Auth Security Info section, enter the user name and password of the user you created earlier in Oracle HCM Cloud. See [Configure Oracle HCM Cloud](#).
 - d. Click **Save**.
4. To return to the process application's main page, click the application's name in the breadcrumb.

Configure a Third-Party Connector

Optionally, add another connector to your application to connect to a third-party system, and communicate the uniform orders to suppliers. You can create a connector to an external SCM application. See [Configure REST Connectors in Designer](#). If you add another connector, you'll need to reference it in the **Place Order with Uniform Provider** activity in the process flow.

Activate the Application

After you've configured the roles and connectors, you can activate the application.

On the process application's main page, click **Activate**. In the Activate pane, with the default snapshot selected, click **Activate**.
A message confirms that the application has been activated.

4

Configure a Journey in Oracle HCM Cloud

After you activate the recipe in Oracle Cloud Infrastructure Process Automation, you must register the recipe's process flow in Oracle HCM Cloud and create a new Journey.

Log in to your Oracle HCM Cloud instance with an account that has access to Journeys (Manage Journey By HR role) and perform the following tasks.

Register the Process in HCM Journeys

1. In the Setup and Maintenance work area, click **Workforce Information** in the Function Areas pane.
2. Click the **Checklist Integrations** task to open the Configure Checklist Integration page.
3. Click **Add** to open the Integrations Details page, and enter the following information.

Field	Field Type	Value
Integration Category	Drop-down list	Process Automation

Field	Field Type	V a l u e
Integration Type	Drop-down list	S t r u c t u r e d p r o c e s s
Integration Code	Text	u n i f o r m S e l e c t i o n

Field	Field Type	Value
Application Name	Drop-down list	Employee Uniform Request
Process Name	Drop-down list	Uniform Selection

4. Select the **Enable and send information for process automation integration** check box.
5. Click **Validate**.
You'll see a success message in the Validate Integration Details section.
6. Click **Save and Close**.

Create a New Journey

1. In the Setup and Maintenance work area, click **Workforce Information** in the Function Areas pane.
2. Click the **Checklist Templates** task, and then click **Create**.

3. On the Create Checklists page, perform the following actions.
 - a. Click the **General** tab, and add the following information.

Field	Field Type	Value
Name	Text	LL Uniform Request
Description	Text	This Journey is used to make a uniform request for a new employee.
Category	Drop-down list	Person

- b. Leave all the other fields with default values, and click **Save**.
 - c. Click the **Tasks** tab, and on the Create Tasks page, enter the following details.

Field	Field Type	Value
Name	Text	Initiate Uniform Request
Sequence	Text	1
Description	Text	This task starts the uniform request process.
Required	Check box	Check the box
Task Type	Drop-down list	Process Automation
Process Section	Drop-down list	Process Section 1 – Start Process
Process Configuration	Drop-down list	Employee Uniform Request

- d. Leave all the other fields with default values, and click **Save and Close**.
 - e. Repeat Steps 3(c) and 3(d) to add another task with the following details.

Field	Field Type	Value
Name	Text	Check the uniform request process status
Sequence	Text	2
Description	Text	This task checks the status of the uniform request process.
Required	Check box	Check the box
Task Type	Drop-down list	Process Automation
Process Section	Drop-down list	Process Section 2 – Check Process Status
Process Configuration	Drop-down list	Employee Uniform Request

You can now see both the tasks listed on the **Tasks** tab.

- f. Click the **General** tab, and select the **Active** check box for the status of the checklist.
4. Click **Save and Close** to return to the Checklist Templates page.

5

Run the Recipe

After you've completed the configurations in both Oracle HCM Cloud and Oracle Cloud Infrastructure Process Automation, you can run the recipe.

1. Run the recipe.
 - a. On your Oracle HCM Cloud instance, log in as a user with the Process User role, and assign the Journey to an employee.
 - i. On the Explore page of HCM Journeys, enter **Uniform** in the **Search** field to find the Journey you created earlier.
 - ii. For test purposes, assign the Journey to yourself. Click the Journey, then click **Actions**, and select **Add to My Journeys**.
 - iii. Navigate to the **My Journeys** tab, and click the **Uniform Request** Journey.
 - iv. On the Journey's page, expand the **Initiate Uniform Request** task, and click **Start**.
You've now triggered the recipe.
 - v. Click **Done**.
 - b. Log in to the email account of the Journey assignee (Employee role) to view and complete the uniform-request form.
 - c. Log in to the email account of the approver (Approver role) to view the request notification and approve the same.
2. Track the status of the request on the HCM Journey's page.
3. Log in to the email account of the Journey assignee, and check for the request-completion notification.

You can now mark the status of the second task in the HCM Journey as **Done**.

Related Documentation

- [Using Oracle Cloud Infrastructure Process Automation](#)
- [Implementing Global Human Resources](#)
- [REST API for Oracle Fusion Cloud HCM](#)