

Oracle Fusion Cloud Human Resources

How do I associate a guided journey with different journey pages, tabs, and tasks?



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How do I associate a guided journey with different journey pages, tabs, and tasks?

1 Overview

Introduction

You can associate a guided journey for Redwood pages by using Visual Builder Studio (VB Studio). Additionally, you can associate guided journey tasks to be displayed in an assigned journey when you configure the journey task.

This table shows when you can use each method based on the usage.

Association Method	Usage	Display
Using guided journey page property in VB Studio.	- When you want to display the guided journey tasks at the page level or section level in a Redwood page. For example, guided journey video task on the Redwood Goal Setting page to show users how to create goals. - Available for all Redwood pages.	- Displayed as a banner at the page level of a Redwood UI. - Displayed as a link at the section level of a Redwood UI.
Using guided journey and task attributes during task configuration.	- When you want to display guided journey tasks in a specific task of an assigned journey. For example, guided journey video task displayed in an onboarding journey task for adding emergency contacts. - Available only within an assigned journey task.	Displayed within the task of an assigned journey.

Before You Begin

These are the prerequisites before you configure the guided journey:

- Set up VB Studio before you enable the guided journey for the Redwood page by using VB Studio. For more information, see [Set Up VB Studio to Extend Oracle Cloud Applications](#).
- Set the ORA_PER_GUIDED_JOURNEYS_ENABLED and ORA_PER_GUIDED_JOURNEYS_SETUP_REDWOOD_ENABLED profile options to Y. For more information, see this topic: [How do I enable a profile option?](#)
- Create tasks relevant for the journey.
- Enable the guided journey for the Redwood page by using VB Studio.
- Associate tasks that you want to display at the page level or section level in the Redwood page using page properties.

Security Privileges for Accessing Guided Journeys

This table shows the privileges that needs to be granted to users:

Privilege Name and Code	Privilege Type	Usage
Journey Builder Duty (ORA_PER_JOURNEY_BUILDER_DUTY)	Duty	View Guided Journey Redwood setup page.
Manage Guided Journeys (ORA_PER_MANAGE_GUIDED_JOURNEYS)	Aggregate and Function	View Guided Journey Redwood setup page.
Access HCM Common Components (HRC_ACCESS_HCM_COMMON_COMPONENTS_PRIV)	Function	View guided journeys on responsive pages.
Use REST Service – Guided Journeys Read Only (ORA_PER_REST_SERVICE_ACCESS_GUIDED_JOURNEYS_RO)	Aggregate	View guided journeys on Redwood pages.
Use REST Service – Guided Journey Responses (ORA_PER_REST_SERVICE_ACCESS_GUIDED_JOURNEY_RESPONSES)	Aggregate	Manage questionnaire task responses in a guided journey.
Use REST Service – Guided Journey Responses Read Only (ORA_PER_REST_SERVICE_ACCESS_GUIDED_JOURNEY_RESPONSES_RO)	Aggregate	View questionnaire task responses in a guided journey.

2 Associate Guided Journey

Associate a Guided Journey with Different Journey Pages, Tabs, and Tasks

This table shows the journey tabs, pages, and the levels where you can associate a guided journey.

UI Page Name	Name in VB Studio	Page Level Guided Journey	Section Level Guided Journey	Conditions
Explore tab	Explore Journeys	Yes	Yes	• Journey Code • Journey Category • Journey Name • Journey Task • Journey Template ID • Journey Template Object • Template Task • Worker Journey ID • Worker Journey Template ID • Worker Journey Template Object • User Roles
My Journeys tab	My Journeys	Yes	Yes	• Journey Code • Journey Category • Journey Name • Journey Task • Journey Template ID • Journey Template Object • Template Task • Worker Journey ID • Worker Journey Template ID • Worker Journey Template Object • User Roles
Assigned Journey Name	Employee Journey	Yes	Yes	• Journey Code

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Associate Guided Journey

UI Page Name	Name in VB Studio	Page Level Guided Journey	Section Level Guided Journey	Conditions
				• Journey Category • Journey Name • Journey Task • Journey Template ID • Journey Template Object • Template Task • Worker Journey ID • Worker Journey Template ID • Worker Journey Template Object • User Roles
My Tasks tab	My Tasks	Yes	No	• Journey Category • Journey Name • Journey Task • Journey Template ID • Journey Template Object • Template Task • Worker Journey ID • Worker Journey Template ID • Worker Journey Template Object • User Roles
Assigned Journeys tab	Manage Journeys	Yes	No	• Journey Code • Journey Category • Journey Name • Journey Task • Journey Template ID • Journey Template Object • Template Task • Worker Journey ID • Worker Journey Template ID • Worker Journey Template Object • User Roles

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Associate Guided Journey

UI Page Name	Name in VB Studio	Page Level Guided Journey	Section Level Guided Journey	Conditions
Team Journeys tab	Journey Landing	Yes	No	• Journey Code • Journey Category • Journey Name • Journey Task • Journey Template ID • Journey Template Object • Template Task • Worker Journey ID • Worker Journey Template ID • Worker Journey Template Object • User Roles
Organization Journeys tab	Journey Landing	Yes	No	• Journey Code • Journey Category • Journey Name • Journey Task • Journey Template ID • Journey Template Object • Template Task • Worker Journey ID • Worker Journey Template ID • Worker Journey Template Object • User Roles
<i>Assigned Journey Name</i>	Manager Journey	Yes	Yes	• Journey Code • Journey Category • Journey Name • Journey Task • Journey Template ID • Journey Template Object • Template Task • Worker Journey ID • Worker Journey Template ID

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Associate Guided Journey

UI Page Name	Name in VB Studio	Page Level Guided Journey	Section Level Guided Journey	Conditions
				- Worker Journey Template Object - User Roles
<i>Assigned Journey Name</i>	Edit Assigned Journey	Yes	Yes	- Journey Code - Journey Category - Journey Name - Journey Task - Journey Template ID - Journey Template Object - Template Task - Worker Journey ID - Worker Journey Template ID - Worker Journey Template Object - User Roles
Activity tab	Journey Activity	Yes	No	- Journey Code - Journey Category - Journey Name - Journey Task - Journey Template ID - Journey Template Object - Template Task - Worker Journey ID - Worker Journey Template ID - Worker Journey Template Object - User Roles
Activity Details	Activity Details	Yes	Yes	- Journey Allocation ID - Source - Source Category - Journey Category - Journey Name - Journey Task - Journey Template ID

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Associate Guided Journey

UI Page Name	Name in VB Studio	Page Level Guided Journey	Section Level Guided Journey	Conditions
				• Journey Template Object • Template Task • Worker Journey ID • Worker Journey Template ID • Worker Journey Template Object • User Roles
Assign Journey	Assign Journey	Yes	Yes	• Journey Code • Journey Category • Journey ID • Journey Name • Subject Type • Journey Task • Journey Template ID • Journey Template Object • Template Task • Worker Journey ID • Worker Journey Template ID • Worker Journey Template Object • User Roles
New Journey	Create Personal Journey	Yes	Yes	• Journey Category • Journey ID • Journey Name • Subject Type • Journey Task • Journey Template ID • Journey Template Object • Template Task • Worker Journey ID • Worker Journey Template ID • Worker Journey Template Object • User Roles

This table shows the setup pages and the levels where you can associate a guided journey.

UI Page Name	Name in VB Studio	Page Level Guided Journey	Section Level Guided Journey	Conditions
Journey Console	Journey Console	Yes	No	User Roles
Journey Console Details	Journey Console Details	Yes	Yes	User Roles
Journey Configurations	Configurations Search	Yes	No	User Roles
Add Configuration	Configurations Manage	Yes	Yes	User Roles
Category Security	Categories Search	Yes	Yes	User Roles
HCM Electronic Signature Configurations	Configuration Manage	Yes	No	User Roles
Journey Integrations	Search	Yes	No	User Roles
Configure Journey Integration	Integrations - Create	Yes	No	User Roles
Configure Journey Integration	Integrations - Search	Yes	No	User Roles
Journey Scheduled Allocations	Journey Scheduled Allocations	Yes	No	User Roles
Scheduled Allocation Name	Journey - Scheduled Allocations Edit	Yes	No	User Roles
Journeys Setup	Templates - Landing	Yes	No	User Roles
Journey Templates	Templates - Search	Yes	Yes	User Roles
Journey Templates > Template Name	Templates - Manage	Yes	Yes	User Roles
Task Library	Task Library	Yes	Yes	User Roles
New Task	Template Task Details	Yes	Yes	User Roles
Task Groups	Task Groups - Search	Yes	Yes	User Roles
Task Groups	Task Groups - Manage	Yes	Yes	User Roles
New Journey (New or Use Existing)	Templates - Search	Yes	Yes	User Roles
Add Journey Task	Add Journey Task	Yes	Yes	User Roles

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Associate Guided Journey

UI Page Name	Name in VB Studio	Page Level Guided Journey	Section Level Guided Journey	Conditions
Quick Action Name where Contextual Journey is Enabled	Contextual Journey Details	Yes	No	User Roles
Quick Action Name where Contextual Journey is Enabled	Contextual Journey Gallery	Yes	Yes	User Roles
Quick Action Name where Contextual Journey is Enabled	Contextual Journey Preview	Yes	Yes	User Roles
Employee Survey Journey	Employee Survey Journey	Yes	Yes	User Roles
Journey Preview	Journey Preview	Yes	Yes	User Roles
New Task	Journey Task Details	Yes	Yes	User Roles

3 Example of Associating Guided Journey

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.

Configure a Guided Journey for Add Department Page

1. Go to **My Client Groups > Journeys Setup > Guided Journey**.
2. Click **Create** and enter details for the creation method you selected in the New Journey panel drawer.
3. Click **Create Draft**.
4. In the **Tasks** section of the **Overview** tab, create the necessary tasks that need to be part of the department creation guided journey.
5. Preview the journey and activate the journey template.

Enable Guided Journey for Add Department Page in Visual Builder Studio

1. Go to **My Client Groups > Workforce Structures > Departments**.
2. Click **Add Department**. The New Department page is displayed.
3. 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.
4. 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.
5. Select **Express** mode in VB Studio.
6. 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. Select the guided journey that you created in the section: Configure a Guided Journey for Add Department Page.
 - b. Set Guided Journeys Task Codes at the page level: This property controls the display of guided journey tasks at the page level. Select the page level guided journey tasks that you created. 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. Select the guided journey that you created in the section: Configure a Guided Journey for Add Department 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. Select the section level guided journey tasks that you created. 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.

7. 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.

Configure a Guided Journey for Explore Tab of Journeys

1. Go to **My Client Groups > Journeys Setup > Guided Journey**.
2. Click **Create** and enter details for the creation method you selected in the New Journey panel drawer.
3. Click **Create Draft**.
4. In the **Tasks** section of the **Overview** tab, create the necessary tasks that need to be part of the guided journey.
5. Preview the journey and activate the journey template.

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

1. Go to **My Client Groups > Journeys**.
2. Click the **Explore** tab.
3. 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.
4. 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.
5. Select **Express** mode in VB Studio.
6. 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. Select the guided journey that you created in the section: Configure a Guided Journey for Explore Tab of Journeys.
 - b. Set Guided Journeys Task Codes at the page level: This property controls the display of guided journey tasks at the page level. Select the page level guided journey tasks that you created. 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. Select the guided journey that you created in the section: Configure a Guided Journey for Explore Tab of 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. Select the section level guided journey tasks that you created. 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.

7. 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.

Associate Guided Journey Tasks with a Journey Task

1. Go to **My Client Groups > Journey Templates**.
2. Click the journey name for whose task you want to associate guided journey tasks.
3. In the Overview tab, Tasks section, click the **Edit** icon for the task where you want to associate guided journey tasks.
4. Click the **Advanced** tab.
5. Select the guided journey from the **Guided Journey** list. The tasks of the selected guided journey will be auto populated in the **Journey Tasks** field.
6. Select the guided journey tasks that you want one task at a time.
7. Click **Save**.

After you associate the guided journey tasks with a journey task, the user can access the guided journey tasks at the section level within the task in an assigned journey.

