Oracle Fusion Cloud Human Resources

How do I configure a nudge for document record expiration?

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1 How do I configure a nudge for document record expiration?

Introduction

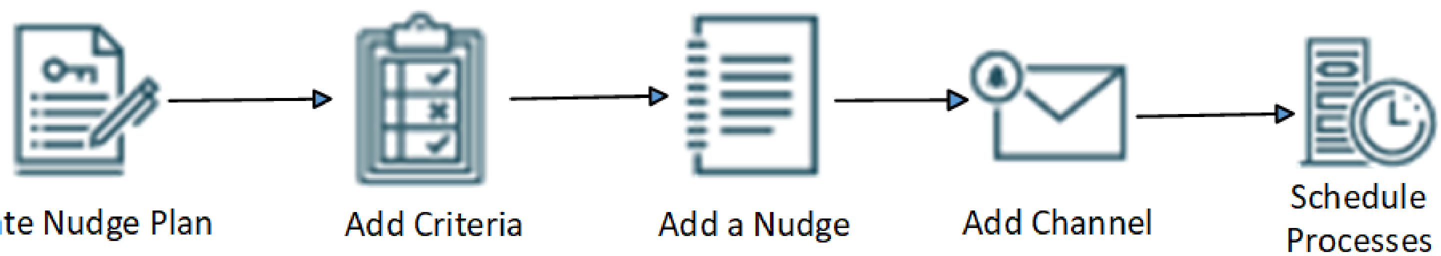
A nudge is a reminder to take a specific action on a certain event.

You can send a nudge for any overdue or pending tasks for events such as renewing any document record expiration, upcoming check-ins, updating goals, pending feedback, or celebrating accomplishments, so that you can take appropriate actions on them.

Scenario

Alex is an HR specialist in DVR Logistics. The company requires employees to update their driver's license before the expiry date. He needs to remind all employees whose driver's license is expiring on 31st March so that the renewed license can be uploaded in the application well before the due date. Knowing that the authorities may take time to renew the license, he wants to send a reminder 15 days before the expiry date.

Here are the key setup steps to accomplish the scenario:



Create a Nudge Plan

Alex needs to create a nudge plan for the employment event. Later, he can choose to add more nudges for other events.

He needs to complete these steps to create the nudge plan.

1. Click **My Client Groups > Show more > Nudge Configuration**.
2. Click **Create**.
3. In the New nudge plan drawer, enter **Document Record Expiry** in the **Name** field.
4. Enter **Nudge plan for document record expiration** in the **Description** field.
5. Select **Global Human Resources** as the **Subscriber**.

6. Select the **end date** (optional).
7. Select the **Schedule Nudge Plan** (optional).
8. Click **Create Draft**.

Add Criteria for the Nudge Plan

To send a nudge to recipients, you need to add criteria to the nudge plan. The criteria for the population enables you to send the nudge to those recipients who match the defined criteria. To send a nudge to a list of people, you can create a filtered list for employees in India.

1. Click **Filtered List** in the Criteria section.
2. Enter **India employees** as the name.
3. Select **Worker assignment extract** as the object and **Nudges** as the subscriber.
4. In Conditions, click **+** and select these values.

Field	Value
Attribute	Country
Operator	Is one of
Attribute Value	India

5. Click **Create**.
6. On the Document Record Expiry page, select **India employees**.
7. Click **Save**.
8. Click **Activate** to activate the nudge plan.

Add a Nudge

Add a nudge to the plan. You need to add details about the nudge. Alex chooses to create a new nudge for the reason expiry date of a document record is approaching

1. On the Document Record Expiry page, click **Add** in the Nudges section.
2. Select the **Module** as **Human Resources**.
3. Select **Expiry date of a document record is approaching** as the **Reason**. You can change the other attributes if you prefer.
4. Select the **Document Type** as **Driver's License**.
5. Enter the number of days before the document record expires by when the nudge must be triggered in the **Days Before Expiry** field, enter **15**.
6. Click **Save**.

Add a Channel

Next. you need to add a channel through which you want to send the nudge to recipients.

1. Click the nudge you just created.
2. Click **Add** in the Channels section.
3. Select the **Type** as **Email**.
4. The **Recipient Type** is populated as Employee, by default.
5. The **Content Type** is populated as Default Content, by default.
6. The **Title** (subject of the email) and the content are also populated, by default.
7. Click **Save**.

Schedule Processes

After you configure a nudge, the Process HCM Nudges scheduled job evaluates active nudges and identifies the people to whom the nudge needs to be sent to.

1. On the home page, under **Tools**, click **Scheduled Processes**.
2. Click **Schedule New Process**.
3. Schedule the **Process HCM Nudges** and **Process HCM Scheduled Nudges** scheduled jobs to evaluate nudges.
4. Click **Submit**.

Check Details of Triggered Nudges

You can check the status and details of the nudges sent. Here's how you can do that:

1. On the Nudge Configurations page, click **Nudge Plan Executions**.
2. On the Nudge Plan Executions page, click the link in the **Request Number** column.

   On the Execution Details page, the **Summary** tab provides information about the status and number of nudges in the selected nudge plan. The **Detail** tab provides information about each nudge in the nudge plan and other details. If the status isn't **Complete**, you can view the execution errors and check why the nudges weren't sent.