Oracle Fusion Cloud Human Resources

Journeys Questions and Answers

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1 Journeys Questions and Answers

How do I enable the list of persons assignee type to create a filtered list to assign journeys?

1. Go to **Setup and Maintenance > Tasks panel > Search > Manage Administrator Profile Values**.
2. Set the site-level profile value for the ORA_PER_SOA_JOURNEY_ASSIGNEE_SELECTION_TYPE profile option to **L** or **L,O**.
   If you select L, the List of Persons and Person values are shown in the Assignee Selection Type list on the Assign Journey page. If you select L,O the list displays all these values: Directs, List of Persons, Organization, Person

How do I create a filtered list to assign journeys?

1. Go to **My Client Groups > Journeys**.
2. Click the **Explore** tab, select the journey, and then click **Assign**.
3. Select the **List of Persons** value from the **Assignee Selection Type** list.
4. Click the **Manage list of persons** link.
5. Click **Add** and give a name to the filtered list.
6. Select **Worker assignment extract** for the object, and **Journeys** for the subscriber.
7. Add your conditions for the filtered list.
8. Enter the values for the conditions and click **Create**.
   You can select this filtered list from **List of Persons > Person** when you assign a journey.

Can the journey task performer and owner be evaluated when the task is initiated?

You can evaluate the task performer and owner during task initiation instead of task allocation. To do this, you enable the **Evaluate task performer and owner when task is initiated** option when you configure a task.

To enable the option, follow these steps:

1. Navigate to the home page and click the **My Client Groups** tab.
2. Click **Show More** under Quick Actions.
3. Click the **Journey Templates** quick action in the Journeys Setup area.
4. Click a journey template for whose task you want to enable the option.
5. In the Tasks section, click the **Edit** icon for the task where you want to enable the option.
6. Click the **Advanced** tab.

7. Select **Yes** in the **Evaluate task performer and owner when task is initiated** field.
8. Click **Save**.

Can a user go back to the Explore tab after assigning the journey?

You need to enable the ORA_PER_NAV_EXPLORE_AFTER_JOURNEY_ASSIGN profile option if you want the user to go back to the Explore tab after assigning the journey. By default, this profile option is set to N.

Profile Option Code	Profile Display Name	Default Profile Value
ORA_PER_NAV_EXPLORE_AFTER_JOURNEY_ASSIGN	Navigation to Explore Tab Enabled After Journey is Assigned	N

To enable the profile option, follow these steps:

1. Navigate to the Setup and Maintenance work area.
2. Search for and click the **Manage Administrator Profile Values** task.
3. Search for the ORA_PER_NAV_EXPLORE_AFTER_JOURNEY_ASSIGN profile option code and select the profile option in the search results.
4. In the Profile Values area, enter **Y** in the **Profile Value** field.
5. Click **Save and Close**.
6. Click **Done**.

How do I make the signature pad mandatory for a native eSignature task?

You make the signature pad mandatory so that the Native eSignature task is marked as done only when the user electronically signs on the pad.

The Done button for the task is enabled only when the user signs on the pad.

To make the signature pad mandatory, follow these steps:

1. On the home page, click the **My Client Groups** tab.
2. Click **Show More** under Quick Actions.
3. Click the **Journey Integrations** quick action in the Journeys Setup area, and click **Add**.
4. Select **Electronic signature validation** for the integration category and **Native electronic signature** for the integration type.
5. Enter the integration code, eSignature validation type, and other details.
6. Select **Yes** in the **Display signature pad** field.
7. Select the **Enable E-Signature Validation** check box.
8. Click **Validate**, and then click **Save**.

9. Navigate to the Journey Templates page.
10. Click the journey name for whose task you want to sign.
11. In the **Tasks** section, click the **Edit** icon for the task having task type Electronic Signature.
12. Select **Electronic Signature** for the task type and **Electronic Signature – Native** for the signature type.
13. Select the eSignature validation type that you entered while configuring the integration.
14. Enter the report details and select the **Open report on same tab as task** check box.
15. Enter the task expiry details and click **Save**.

How do I add seeded tokens for journey event alerts?

To add the seeded tokens, follow these steps:

1. On the home page, click **Navigator > Tools > Alerts Composer**.
2. Search and select the event alert.
3. Click **Edit** in the **Action** drop-down list.
4. On the **Templates** tab, select the template where you want to add or update the seeded tokens.
5. Click **Manage Recipients and Message** in the **Edit** drop-down list.
6. In the **Subject** field, place the cursor at the location where you want to add the token, and click the **Expression** icon.
7. Select the **Attribute** option and select the token you want.
8. Click **Apply**.
9. In the **Message Text** field place the cursor at the location where you want to add the token, and click the **Insert Expression** icon.
10. Select the **Attribute** option and select the token you want.
11. Click **Apply** two times, and then click **Save and Close**.

How do I hide inactive worker assignments when assigning journeys?

You need to disable the ORA_PER_JRN_DISPLAY_INACTIVE_WKRS_LOV profile option to hide the inactive worker assignments for users when they assign journeys. By default, this profile option is set to Y.

Profile Option Code	Profile Display Name	Default Profile Value
ORA_PER_JRN_DISPLAY_INACTIVE_WKRS_LOV	Inactive Worker Assignments Displayed in Journeys	Y

To disable the profile option, follow these steps:

1. Navigate to the Setup and Maintenance work area.
2. Search for and click the **Manage Administrator Profile Values** task.
3. Search for the ORA_PER_JRN_DISPLAY_INACTIVE_WKRS_LOV profile option code and select the profile option in the search results.

4. In the Profile Values area, enter **N** in the **Profile Value** field.
5. Click **Save and Close**.
6. Click **Done**.

How do I include pending workers and nonworkers when assigning a journey to directs and organization?

Users can include pending workers and nonworkers in the **Person Type to Include** field when they assign a journey to Directs and Organization from the Explore tab.

You need to enable the ORA_PER_AOR_CALCULATE_NONWORKER profile option so that users can assign journeys to nonworkers. By default, this profile option is set to No.

Profile Option Code	Profile Display Name	Default Profile Value
ORA_PER_AOR_CALCULATE_NONWORKER	Calculation of Nonworker Representatives Enabled	No

To change the default profile option value and include pending workers and nonworkers, follow these steps:

1. Navigate to the Setup and Maintenance work area.
2. Search for and click the **Manage Administrator Profile Values** task.
3. Search for the ORA_PER_AOR_CALCULATE_NONWORKER profile option code and select the profile option in the search results.
4. In the Profile Values area, enter **Yes** in the **Profile Value** field.
5. Click **Save and Close**.
6. Click **Done**.

How do I enable sentiment analysis and summarization for the text responses in a survey journey?

To enable sentiment analysis and summarization, follow these steps:

1. Create questions of response type text for the survey and enable sentiment analysis and summarization for them. To do this, follow these steps:
    a. On the home page, click the **My Team** tab.
    b. Click **Show More** under Quick Actions.
    c. Click the **Create Survey** quick action in the **Employment** area.
    d. Click the **Create Survey** option, and enter the survey name.
    e. Click **Add** in the Questions section, and select the **New question** option.
    f. Enter the question text. If you want to mark the questions as required, select **Required**.
    g. Make sure that the **Text** value is selected in the **Response Type** field.

   h. Select the **Enable Sentiment Analysis** and **Enable Summarization** check boxes, and then click **Save**.
   i. Repeat steps e through h to create other questions with the response type as text.
   j. Click **Continue**, and then click **Save**.
   k. Click **Continue**, enter the assign details for the survey, and then click **Submit**.
2. Enable the ORA_PER_JRNY_SURVEY_SENTIMENT_ENABLED and ORA_PER_JRNY_SURVEY_SUMMARIZATION_ENABLED profile options.

Profile Option Code	Profile Display Name
ORA_PER_JRNY_SURVEY_ SENTIMENT_ENABLED	Survey Journey Sentiment Enabled
ORA_PER_JRNY_SURVEY_ SUMMARIZATION_ENABLED	Survey Journey Summarization Enabled

   To enable 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 profile option code and select the profile option in the search results.
   d. In the Profile Values area, click the **+** (New) icon.
   e. Select **Site** in the **Profile Level** field.
   f. Enter **Y** in the **Profile Value** field.
   g. Click **Save and Close**.
   h. Click **Done**.
3. After you enable the profile options, run the **Process Survey Response Summary** process.

How do I troubleshoot journey issues?

This table describes how you can debug and resolve issues in journeys.

Question	Answer
Why can't the journey assignee view the journey?	Here are a few things that you need to check: • Does the journey template have an eligibility profile? If yes, does the person to whom the journey is being assigned meet the eligibility criteria defined in the eligibility profile? • Does the action name configured in the journey template match the action performed on the person to whom the journey is being assigned? (this should be the same action name) • Is the Allocation Criteria set to **When the checklist action record becomes effective**? If yes, is the Days for Initiation configured? If yes, check if the date of transaction or pending worker's proposed start date fulfills the configuration. • Are there any target or delay durations configured for the task? If so, ensure these fall within the date ranges of the transaction. • Is the journey visible under My Client Groups > Journeys > Person search?
Why didn't the task performer receive the journey or task notification?	• Ensure notifications are enabled on the application.

Question	Answer
	• Check if the journey or task is assigned to the worker by navigating to My Client Groups > Journeys > Person search > Click journey name and view the tasks
Why is a future hire not able to access Cloud HCM?	A user account gets created only for workers existing as of the current date. This includes a pending worker existing as of the current date with an actual start or hire date in the future. Hence, creating a pending worker is a pre-requisite if you want the future hire or rehire to access the Cloud HCM application in general.
Why is a journey not assigned to a worker that is loaded using HDL or HSDL?	For performance reasons, the events resulting from loading a worker are suppressed during a bulk load using HDL or HSDL. However, you can assign journeys through HDL or HSDL after the worker is created in the system.
I am unable to find information about a journey task that has been reopened.	This information is not displayed on the UI. However, you can build a custom report to fetch information from the PER_ALLOCATED_TASKS table, under column names REOPENED_BY and REOPEN_DATE.
I am unable to view the document or it gives an error when I click the **See Document** link for an Electronic Signature - Native task.	This can be due to any of these reasons: • Check if the report (document to be electronically signed) is configured correctly with the necessary parameters. • Ensure that the necessary permissions are added to the report by navigating to More > Permissions for that report. • Ensure that the report path is correctly configured on the journey task configuration page.
I can't see the report when I click **See Report**	This can be due to any of these reasons: • Check if the report is configured correctly with the necessary parameters. • Ensure that the necessary permissions are added to the report by navigating to More > Permissions for that report. • Ensure that the report path is correctly configured on the journey task configuration page.
How can I delegate a journey?	You can delegate your journey responsibility to others. For more information about how to delegate, refer to the Role Delegation topic in the Securing HCM guide. However, note that the person to whom you delegate doesn't receive any notifications.
I am unable to see the details of the person completing journeys tasks.	If a journey task is marked done or not applicable directly in the application, the name of the person completing the task is displayed. However, if the task is marked done or not applicable through the notification (bell icon or email), the name of the person completing the task isn't displayed. Moreover 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. In the Journeys UI, by design the name of the person completing the task is displayed only in Other's tasks section.
Why are the user contact details not displayed?	The Contact Info (name, email, phone) comes from the person record, and not the user account record. So, if the user you created doesn't have a person record, this information won't be displayed. Instead, only the user name will be displayed.

Question	Answer
How can I configure assignment level security for journeys?	No, you can't. Journeys doesn't support assignment level security.
What happens to assigned journeys and tasks when I cancel the work relationship?	If you cancel the only work relationship a person has, then the person doesn't get listed in the journeys search page. But, the assigned journeys, tasks, and other related data continue to be retained in the journey tables for that person. If a new work relationship is created for the person, you can find the person in the journeys search page once again. You can then see and manage all the assigned journeys and tasks that were created and updated before that person's work relationship was canceled.

What are the considerations for using the Embedded Application Task type in journeys?

The Embedded Application Task type reduces navigation and allows the user to complete application tasks by using the task regions embedded in a journey task.

For example, you can perform tasks by viewing these embedded application regions:

- Document Records embedded task region to upload your birth certificate.
- Address embedded task region to provide your home address.
- Family and emergency contacts embedded task region to provide your emergency contact details.
- Specific sections related to the Skills and Qualifications embedded task region. For example, Accomplishments section to update accomplishments and Licenses and Certifications section to provide certification details.
- Specific tasks related to the Compensation area. For example, Salary task to review salary and Shares task to review employee stock options.

Here's some points to consider when you use the Embedded Application Task type:

- Only the Redwood pages and regions that are displayed in the Embedded Application Task list of values (LoV) are supported.
- Attachments uploaded as part of the approval process don't get stored in document records.
- The completion criteria are specific to the task for which they are configured. Therefore, you need to configure the completion criteria for each embedded application task according to your requirement.
- You have configured a completion criteria for an embedded application task and also configured approvals for the same task. In this case, the task can be marked as done only after the application task is approved.
- You can view and manage data in an embedded application task based on your data security access for that application task.
- If you have personalized your standalone Redwood pages, the personalizations don't reflect when the page is embedded as a journey task.

- Fields that are hidden in the region by default will continue to be hidden in the embedded application task region. Additionally, fields that are visible in the region by default will continue to be visible in the embedded application task region. This behavior can't be modified currently.
- If you change the task type configuration after the journey is assigned to an employee, the assigned journey will retain the earlier task type. However, any journey assigned after the configuration change will use the new task type. For example, if you assign a journey after changing the task type from Application Task to Embedded Application Task, the employee will see the embedded application task in the assigned journey.
- The Skill Center section isn't supported for the embedded application task in journeys. Therefore, even if you configure the embedded task with the section, it won't be displayed on the Journeys UI.
- All seeded and customer defined sections are available in the Sections LoV when you configure these embedded application tasks:
  - Skills and Qualifications
  - Talent Ratings
- If you have set up approvals for a section in the Skills and Qualifications embedded application task, you must not select the section when you configure the task. This is because approval-enabled sections aren't currently supported.
- Business rules are supported for these embedded application task fragments in journeys:
  - Name
  - Demographic Info
  - Document Records
  - Family and Emergency Contacts
  - National Identifiers
  - Biographical Info
  - Driver’s Licenses
  - Phone
  - Email
  - Other Communication
  - Address
  - Citizenship
  - Passports
  - Visas and Permits
  - Disability Info
  - Assignment
  - Contract
  - Weekly Working Hours
  - Seniority Dates
  - Salary
  - Individual Compensation
  - Payment Methods
  - Stocks

    - Recurring One Time Payments

- Business rules aren't currently supported for these embedded application task fragments in journeys:
    - Skills and Qualifications
    - Talent Ratings

This table shows the list of supported embedded application tasks and additional details about them.

Embedded Application Task	Performer	Read Only	Supports Completion Criteria	Approval Triggered
Additional Compensation	Worker	Yes	No	Not applicable
	Line Manager			
	HR Specialist			
Address	Worker	No	Yes	Yes
Assignment Details	Worker	Yes	No	Not applicable
Biographical Info	Worker	No	Yes	Yes
Citizenship	Worker	No	Yes	Yes
Compensation Change Statements	Worker	Yes	No	Not applicable
	Line Manager			
	HR Specialist			
Contract Information	Worker	Yes	No	Not applicable
Demographic Info	Worker	No	Yes	Yes
Disability Info	Worker	No	Yes	Yes
Document Delivery Preferences	Worker	No	No	Not applicable
Document Records	Worker	No	Yes	Yes
Driver's licenses	Worker	No	Yes	Yes
Email details	Worker	No	Yes	Yes
Family and emergency contacts	Worker	No	No	Yes
Name	Worker	No	Yes	Yes
National Identifiers	Worker	No	Yes	Yes

Embedded Application Task	Performer	Read Only	Supports Completion Criteria	Approval Triggered
Other Communication Accounts	Worker	No	No	Yes
Passports	Worker	No	Yes	Yes
Payment Methods	Worker	No	Yes	No
Personal Contributions	Worker	Yes	No	Not applicable
Phone details	Worker	No	Yes	Yes
Recurring and one-time payments	Worker	Yes	No	Not applicable
	Line Manager			
	HR Specialist			
Salary	Worker	Yes	No	Not applicable
	Line Manager			
	HR Specialist			
Shares	Worker	Yes	No	Not applicable
	Line Manager			
	HR Specialist			
Skills and Qualifications	Worker	No	No	No
Talent Ratings	Worker	No	No	No
Visas and permits	Worker	No	Yes	Yes
Weekly Working Hours	Worker	Yes	No	Not applicable
Worker Seniority Dates	Worker	Yes	No	Not applicable

What are the considerations for using Enterprise Onboarding journey category?

An Enterprise Onboarding journey template is a specific journey that you create to onboard new hires either before, on, or after their joining date.

It contains a master journey and step journeys. An Enterprise Onboarding step includes tasks that need to be performed in each phase of the onboarding process. The master journey links steps in the onboarding process. You need to configure at least one step that needs to be linked to this master journey. There's no maximum limit for the number of journey steps that can be created. You can specify the sequence of the steps. For example, in your master journey, you can configure a step titled Your First Day to include onboarding tasks that the employee needs to complete on their joining date. You can add one or more tasks that a new hire needs to perform before their first day, such as providing identity proofs.

If you use Enterprise Onboarding journey category, here are some points that you need to consider:

- There can be only one active instance of the journey of this category. However, let's say you specify the Move to HR and Add Pending Worker actions in enterprise onboarding journeys. In this case, the Move to HR action internally calls the Add Pending Worker action so that both the journeys can get assigned at the same time. For the worker, the Journeys page displays the journey assigned most recently. Therefore, it's recommended not to use both these actions together.
- If your enterprise onboarding journey has multiple steps, then the action you specify in the master template and first step template must be the same.
- When you manually assign a journey, eligibility profiles aren't evaluated for the enterprise onboarding master journey. However, eligibility profiles are evaluated for enterprise onboarding step journey and journey tasks.
- In a rehire process, if the rehired employee already has an in-progress enterprise onboarding category journey from a previous employment, then another instance of an enterprise onboarding journey won't be assigned to them.
- Only one action can be configured in the master enterprise onboarding category journey.
- You can't assign a step journey by itself. You need to assign the entire Enterprise Onboarding category journey.
- You can't delete only the step journey. When you delete an assigned journey, it will delete all the tasks of all the step journeys in that journey.
- You can’t configure a task with a preceding task from another enterprise onboarding step template.
- You can’t use task groups.
- You can't create recurring schedules.
- Notifications aren't sent when an enterprise onboarding step journey is activated.
- You can't configure a reminder alert template for a task in a step journey.
- You can configure nudges only for the Enterprise Onboarding journey, and not for step journeys.
- When you force close an assigned journey, it closes all the tasks of all the step journeys in that journey. It displays the tasks in the step journey only when the criteria is met.
- In Journeys, tasks in all step journeys are displayed even when the step isn't yet active. However, these tasks remain disabled until activated. Whereas in enterprise onboarding, only the step name is visible. The tasks within the step display only when the step becomes active.
- In Journeys, if an enterprise onboarding journey is split into individual journeys, the line manager and HR can see all individual journeys as deferred journeys on the Assigned Journeys tab. However, the employee can see the journey only when it becomes active.
- The Preview feature isn’t supported for the Enterprise Onboarding and Enterprise Onboarding Step journey categories.

Therefore it’s recommended to use other categories when configuring journeys for these reasons:

- You can associate multiple actions based on which the journey is assigned.
- You can assign the same journey multiple times.
- The configuration is simple and consistent.

What are the common configuration requirements for journey notifications?

This table describes solutions for common requirements related to journey notification configurations:

Configuration Query	Solution
What BI data models and templates are available for journey notifications?	These are the journey notification templates you can use: • ChecklistWelcomeReport (ChecklistWelcomeDataModel): Sent to the worker only when journey of the category Enterprise Onboarding is assigned. • TaskActionRequiredReport (TaskNotificationDataModel): Sent for all task types when an action needs to be performed by the user. • TaskFYIReport (TaskNotificationDataModel): Sent for all task types as an information only notification. • ChecklistTaskCombinedNotificationReport (ChecklistTaskCombinedNotificationReportDataModel): Sends combined notifications (actionable and FYI) for journey tasks for each performer, each day, each journey. • ChecklistTaskPerformerFYIReport (TaskNotificationDataModel): Sends report without the **Complete** and **Not Applicable** action buttons if either button is disabled using display properties. Email and worklist BIP notifications for Journeys are displayed in Redwood style. Here are some points to consider: • If you haven't customized your existing notifications, you will experience the new Redwood style notifications without needing to take any action. • If you've modified the notification template, then until you copy and reapply the Redwood template, you will continue to see your customized version of the notification. See the Templates and Data Models Used for HCM Notifications Based on Reports topic in the Using Common Features for HCM guide.
Can journey notifications be configured according to my organization's requirements?	Yes, for more information see the Configure Checklist Notifications Using Reports topic in the Using Common Features for HCM guide.
How can I turn off journey task notifications?	You can stop sending notifications to performers every time a task is assigned or reassigned. To do this, uncheck the **When task is assigned or reassigned** check box for Performer in the Notification Overrides section on the task configuration page. Based on the configuration change, the task will not appear in the journey summary notification as well. If this is the configuration for all tasks in a journey, then no summary notification will be activated.
How can I disable the journey welcome email notification?	You can uncheck the **Send notification on checklist allocation** check box under the **Display Settings** tab when configuring a journey.

Configuration Query	Solution
Why is the LoV empty on the Notification Overrides section of the Notification and Reminders tab?	Prior to release 19C, the user had to select a value from the drop-down list. This selection is no longer required. However, the list of values (LoV) is retained for backward compatibility.
Can I move from BIP based notifications to alerts based notifications?	Yes, you can. For more information, see the Journey Features with Only Alerts-Based Notification Support topic.
Can I remove the **Mark as Complete** and **Mark as Not Applicable** buttons in the task notification?	Yes, you can. If you specify **Hide** for either **Mark as Complete** or **Mark as Not Applicable** when configuring task display properties, both the action buttons don't appear on the task notification. The task notification in this case becomes an FYI notification instead of an action required notification. If you remove the buttons using BPM for the task, the task won't get completed in BPM and the task status will always show as **In Progress**. Removal of the **Mark as Complete** and **Mark as Not Applicable** buttons from the BPM Workflow (AllocatedHumantask) is not a recommended action or a supported option. Both the buttons should be there in the AllocatedHumantask for notifications to be automatically removed from the worklist. Additionally, it is recommended not to modify the seeded AllocatedHumantask workflow as it will impact all journey tasks.
How are tasks displayed in the journey combined summary notification?	Tasks are displayed in the journey summary notification based on when they are due, that is, the task due earliest is displayed first in the list. If there are no due dates configured for your tasks, then there is no definite order for listing the tasks in the combined notification. This is applicable even if sequence is defined for the tasks.
How can I send an email communication to new hires?	You can't send emails to new hires from Journeys. You can however explore the Alerts Composer functionality to meet email notification requirements.
Why is the user not able to view journey task notifications?	The workers may not have the required privileges to view the notifications. Check and enable these profile options for BIP notifications: • BIP_EMAIL_NOTIFICATION_HCM • BIP_EMAIL_NOTIFICATION_HCM_PER • BIP_ONLINE_NOTIFICATION_HCM • BIP_ONLINE_NOTIFICATION_HCM_PER After you enable the profile options, the journey needs to be assigned to the person to view the changed data in the notifications. If the user hasn't inherited these privileges through any custom role, then you need to grant the privileges to the user: • Aggregate privilege: ◦ Print Worker Portrait (ORA_PER_PORTRAIT_MAINTENANCE_DUTY) • Function privileges: ◦ View Notification Details (PER_VIEW_NOTIFICATION_DETAILS) ◦ Approve Transactions (PER_APPROVE_TRANSACTIONS)

Configuration Query	Solution
How can I delay the welcome notification when an Enterprise Onboarding journey gets assigned?	For more information, see the document How to delay Enterprise Onboarding Welcome Notification (https://community.oracle.com/customerconnect/discussion/490310) on Customer Connect.
Why are notification reminders not being sent, even though they are configured at the task level?	Task reminder notifications will be sent only when the task is configured with a target duration.
How can I customize the reminder notification?	If you are using Alerts-based notification, you can customize the ORA_CHK_TASK_REMINDER alert. If you are using BIP-based notifications, you can't customize because the reminder notification doesn't have an associated BIP template or data model. Reminders are sent for each task individually and can't be combined.
Why is the email notification for an offboarding journey not sent to the home email of the terminated worker?	The journey notification for an offboarding journey will be sent to the home email only if the following conditions are true: • The worker has no active assignment in the application when the journey notification is being activated. • The notification is activated after the termination date and the worker has no active assignments left.
Will a user who doesn't have a person record receive a journey task notification?	Yes, such a user will only receive a bell notification, but not an email notification.
How can I send the journey task notification to a person who isn't a user in the Cloud HCM application?	Notifications to non-users aren't supported. You can explore building custom BI reports which can then be emailed to specific email IDs of the external persons or vendors.
Can I enable only reminder notifications for journey tasks, even if other task notifications are disabled?	Yes, you can.
How do journey and task notifications behave in different scenarios?	When a journey is deleted or a task is removed or reassigned, the task notification is withdrawn and the notification content is blank. When a journey is force closed, the task notification is withdrawn and the notification content displays the task status as **Force Closed**.
What happens to existing notifications when you enable Journeys?	Existing notifications continue to be started. If the ORA_PER_JOURNEYS_ENABLED profile option is enabled, you are directed to the appropriate Journeys pages. If the profile option isn't enabled, you will continue to be directed to the respective responsive Onboarding and Checklists pages.
Can I include attachments and comments in a journey BIP notification?	Yes, you can. However, the comments and attachments are stored as part of the notification and won't be accessible from the journey task.

What happens if you select multiple workers when assigning a journey?

When you assign a journey to multiple people from the Assign Journey UI, the Mass Assign Journeys process is activated to evaluate eligibility for the journey and its tasks.

The process is internally run to process the multiple journey assignments, filter out inactive assignments, and only assign the journey to those workers with active assignments.

For example, you have selected 3 workers - Ravi, Rohini, and John, of which you have selected the active assignments of Ravi and Rohini and a non-active assignment of John. In this case, the journey doesn't get assigned to John.

However, when you assign a journey to only one person from the Assign Journey UI and you have selected a nonprimary assignment for the worker, the journey does get assigned to that worker.

For example, you have selected John's non-active assignment. In this case, the journey gets assigned to John.

What are the profile options available for journeys?

Use the Manage Administrator Profile Values task in the Setup and Maintenance work area to manage journey profile options.

You can configure these journey-related profile options as required, to meet your requirements.

Profile Option Code	Profile Display Name	Default Profile Value	Description
ORA_HCM_ESIGN_URL	Provider URL for DocuSign	Not applicable, no longer in use	Enables you to provide the Provider URL for DocuSign.
ORA_PER_CHECKLIST_ACTION_PURGE_BEFORE_DAYS	Purge Duration for Checklist Action Occurrence Records	180 days	Specify the duration in days prior to which existing journey action occurrence records should be deleted.
ORA_PER_CHECKLIST_ASYNC_IDLE_TIME_THREAD	Thread Idle Time During Asynchronous Web Service Checklist Allocation in Journeys	300 sec	Specify the idle time for threads during asynchronous web service journey allocation in Journeys.
ORA_PER_CHECKLIST_ASYNC_MAX_THREADS	Maximum Threads Allowed During Asynchronous Web Service Checklist Allocation in Journeys	5	Specify the maximum number of threads to be used during asynchronous web service journey allocation in Journeys.
ORA_PER_CHECKLIST_DEFER_DOCUSIGN_CREATION	Defer DocuSign Document Creation on Checklist Allocation Enabled	N	Enable the creation of DocuSign document to be deferred during journey allocation. If you want to defer the creation of the document to be signed in DocuSign until the

Profile Option Code	Profile Display Name	Default Profile Value	Description
			time the performer initiates the DocuSign journey task, set the profile value to Y.
ORA_PER_CHECKLIST_DEFER_I9_CREATION	Defer I9 Creation on Checklist Allocation Enabled	N	Enables the creation of I-9 to be deferred during journey allocation. An I-9 document is created in HireRight when the journey is allocated. If you want to defer the creation of the I-9 document until the time the employee accesses the I-9 task, set the value to Y.
ORA_PER_CHECKLIST_DISABLE_ALERTS	Disable Checklist and Task Alert Notifications	N	Disables alert notifications for journey and task.
ORA_PER_CHECKLIST_MANUAL_ASYNC_ALLOCATION	Enable Asynchronous Checklist Allocation	RUX,REST	Enable asynchronous allocation of journeys in responsive pages and REST services. This profile option is for internal use only and users aren’t expected to modify the profile option value. However, the profile option can be modified only for the purpose of debugging and diagnosis by the development team.
ORA_PER_CHECKLIST_NOTIFY_HOME_EMAIL	Checklist Email Notifications Enabled	N	If you set this site-level profile option to Y, journey email notifications are sent to a pending worker's home email address in addition to their user account email. For more information, see How You Enable Checklist Email Notifications During Preboarding.
ORA_PER_CHECKLIST_USE_OAUTH_IN_DOCUSIGN	Enable OAuth for DocuSign	N	Enable OAuth based authentication for DocuSign integration in journeys.
ORA_PER_CHECKLIST_USE_ORACLE_DOCUSIGN_INTG_KEY	Common Integration Key for DocuSign Enabled	Y	If you set this site-level option to N, it enables the integration key field on the configuration page.
ORA_PER_CHECKLIST_USE_PRODUCTION_OAUTH_DOCUSIGN	Production Account for OAuth DocuSign Integration Enabled	Y	Enable the production OAuth Account to be used for DocuSign integration in production environments.
ORA_PER_CHK_ADD_TASK_ENABLED	Enabled Add Properties for Checklist Task	N	If you set this site-level option to Y, it displays the Notification Overrides, Display Properties, and Reminders sections in the Add Task or Edit Task responsive pages.

Profile Option Code	Profile Display Name	Default Profile Value	Description
			This profile option isn't applicable for Journeys (VBCS) pages.
ORA_PER_CHK_ENABLE_I9_CALLBACK	I9 Call Back Enabled	N	Enable I-9 call back to update the I-9 and task status.
ORA_PER_CHK_ENABLE_I9_USERREF_CHANGE	Update of User Reference Enabled for I9 Section 2	N	If you set this site-level option to Y, the **User Reference for Section 2** field in the Configure Checklist Integration page displays the Person Identifier and Person Number values in addition to the default Primary Email value.
ORA_PER_CHK_OPA_ENDPOINT	Specify Application Name for Oracle Process Automation End Point	ORA_PROCESS_AUTOMATION_APP	Specify the application name for Oracle Process Automation end point either as ORA_PROCESS_AUTOMATION_APP or ORA_DIGITAL_ASSISTANT_APP
ORA_PER_CONTEXTUAL_JOURNEYS_ENABLED	Enable Contextual Journeys	N	Enable contextual journeys user interface.
ORA_PER_NUDGE_PROCESS_JOURNEYS_ENABLED	Assigning Journeys to Nudge Recipients Enabled	N	Enable the Nudges ESS process to assign journeys to recipients.
ORA_PER_GUIDED_JOURNEYS_ENABLED	Enable Guided Journeys	N	Enable the user interface for guided journeys.
ORA_PER_JOURNEY_ARCHIVE_DURATION	Journeys Archive Duration	12	Specify the duration in months after which journeys should be archived. If you don't specify a value at the journey template level then this profile value is used for archiving.
ORA_PER_JOURNEY_DEFAULT_SEARCH	Filter Option for Assigned Journeys	ALL	Specify whether to filter assigned journeys by all or direct reports. The possible values are: • All • Directs - Show only directs for the Organization filter. • None - Doesn't display results without a search term.
ORA_PER_JOURNEY_DISABLE_COUNTS	Journeys Count Display Disabled	Hide journey counts and show only categories in use	The possible profile values are: • Hide journey category chip • Hide journey counts and show all categories • Hide journey counts and show only categories in use • Show journey counts

Profile Option Code	Profile Display Name	Default Profile Value	Description
ORA_PER_JOURNEY_ENABLE_ADF_CONFIG_FORM	Redwood to Responsive Switch Enabled for Configurable Form Journey Task	N	Enable the display of the configurable form journey task from redwood to responsive page.
ORA_PER_JOURNEY_PURGE_DURATION	Journeys Purge Duration	12	Specify the duration in months after which journeys should be purged. If you don't specify a value at the journey template level then this profile value is used for purging.
ORA_PER_JOURNEY_SEARCH_CRITERIA	Search Criteria for Assigned Journeys	Journey name or person name	Control the search criteria for the Assigned Journeys tab. The possible profile values are: • Journey name or person name • Person name only
ORA_PER_JOURNEY_SECURITY_ENABLED	Data Security for Journeys Enabled	N	Enable to apply data security to journey templates and assigned journeys.
ORA_PER_JOURNEY_TASKS_USERGUID_ENABLED	GUID Usage for Journey Task Performers Enabled	N	Enable the usage of the Globally Unique Identifier GUID for the logged in user instead of their user name.
ORA_PER_JOURNEYS_ENABLED	Journeys UI Enabled	N	If you set this site-level option to Y you can use Journeys to manage all journey categories be it predefined or user-defined from a single place. When you enable Journeys, the Onboarding and Checklists Tasks apps aren't available.
ORA_PER_JRNY_SEARCH_STARTSWITH	Enable Search in Journeys Using StartsWith	Y	Enables search in Journeys pages by using the StartsWith criteria.
ORA_PER_NUDGE_PROCESS_JOURNEYS_ENABLED	Assigning Journeys to Nudge Recipients Enabled	N	Enable the Nudges ESS process to assign journeys to recipients.
ORA_PER_SOA_JOURNEY_ASSIGNEE_SELECTION_TYPE	Assignee Type for SOA Based Journeys	P	Controls the values in the Selection Type list of values on the Assign Journey page. You can select these types of assignees: • Person (default option) • Directs of a person. Directs refers to employees immediately reporting to the selected person. • Organization of a person. Organization refers to the

Profile Option Code	Profile Display Name	Default Profile Value	Description
			entire management hierarchy of the selected person. • L - List of persons during the journey assignment process
PER_CHECKLIST_IMPEXP_ ENABLED	Checklist Import Export Enabled	N	Enables the **Import** option in the Checklist Templates setup page. For information about creating the profile, see Create and Edit Profile Options in the Implementing Applications Guide.

How do I configure the completion criteria based on flexfields for a journey task?

Here's an example of how you can configure the completion criteria based on descriptive flexfields for the National Identifiers embedded application task.

You create a rule where an error message is displayed if the National Identifier Number and Issuing Authority (Attribute 1) attributes are blank.

1. Go to **My Client Groups > Journey Templates**.
2. Search and click the journey template that contains the embedded application task you want to configure.
3. In the **Tasks** section, click the **Edit** icon for the embedded application task where you want to configure the completion criteria.
4. Click the **Advanced** tab.
5. Click the **Add** icon in the Completion Criteria section.
6. Select the **National Identifier** name for the business object.
7. Retain the status as **Active** and enter this text for the error message: **Please provide National Identifier Number and Issuing Authority**
8. Click **Configure object criteria**.
9. Specify values as indicated in this table. Where no value is indicated, use the default.

Field	Value
Rule Name	NI and IA blank
Description	Rule condition if NI and IA are left blank
Attribute	National Identifier Number
Operator	Is not blank

10. Click the **Add Condition** icon and enter these values.

Field	Value
Attribute	Attribute 1
Operator	Is not blank

11. Click **Save** three times.

    When the task performer completes the task, the error message is displayed on the journeys task page if the National Identifier Number and Issuing Authority (Attribute 1) attributes are left blank.

This example describes how you can configure the completion criteria based on extensible flexfields for the Additional Person Info application task. You create a rule where an error message is displayed if the currency attribute is not provided for this additional person information context: contingent talent info

1. In the **Tasks** section, click the **Edit** icon for the application task where you want to configure the completion criteria.
2. Click the **Advanced** tab.
3. Click the **Add** icon in the Completion Criteria section.
4. Select the **Worker Additional Person Information** name for the business object.
5. Retain the status as **Active** and enter this text for the error message: **Please provide currency in contingent talent info**
6. Click **Configure object criteria**.
7. Specify values as indicated in this table. Where no value is indicated, use the default.

Field	Value
Rule Name	Currency blank
Description	Rule condition if currency is left blank
Attribute	Information 1
Operator	Is not blank

8. Click **Save** three times.

   When the task performer completes the task, the error message is displayed on the journeys task page if the Currency attribute is left blank.

This example describes how you can configure the completion criteria based on developer descriptive flexfields for the Demographic Info embedded application task. You create a rule where an error message is displayed if the Veteran Self-Identification Number is blank.

1. In the **Tasks** section, click the **Edit** icon for the application task where you want to configure the completion criteria.
2. Click the **Advanced** tab.
3. Click the **Add** icon in the Completion Criteria section.
4. Select the **Demographic Info** name for the business object.
5. Retain the status as **Active** and enter this text for the error message: **You need to enter Veteran Self-Identification Number**
6. Click **Configure object criteria**.

7. Specify values as indicated in this table. Where no value is indicated, use the default.

Field	Value
Rule Name	Veteran status blank
Description	Rule condition if the veteran self-identification number is blank
Attribute	Information Category
Operator	Equals
Value	US

8. Click the **Add Condition** icon and enter these values.

Field	Value
Attribute	Information 14
Operator	Is not blank

9. Click **Save** three times.

   When the task performer completes the task, the error message is displayed on the journeys task page if the Veteran Self-Identification Number is left blank.

This example describes how you can configure the completion criteria based on developer descriptive flexfields for the Personal Details application task. You create a rule where an error message is displayed if the disability range isn't updated.

1. In the **Tasks** section, click the **Edit** icon for the application task where you want to configure the completion criteria.
2. Click the **Advanced** tab.
3. Click the **Add** icon in the Completion Criteria section.
4. Select the **Disability Info** name for the business object.
5. Retain the status as **Active** and enter this text for the error message: **You need to update disability range**
6. Click **Configure object criteria**.
7. Specify values as indicated in this table. Where no value is indicated, use the default.

Field	Value
Rule Name	Disability range not updated
Description	Rule condition if the disability range is not updated
Attribute	Information Context
Operator	Equals
Value	US

8. Click the **Add Condition** icon and enter these values.

Field	Value
Attribute	Information 4
Operator	Is blank

9. Click **Save** three times.

   When the task performer completes the task, the error message is displayed on the journeys task page if the disability range isn't updated.

Points to Consider

- The Additional Person Info application task isn't available out-of-the-box and has to be enabled through customization.

How are task performers and task owners determined in journeys?

The date when the action becomes effective for certain journey actions is predetermined.

Journey Action	Date When Action Becomes Effective
• Add Pending Worker	Proposed start date of the pending worker
• Add Assignment • Add Temporary Assignment • Add Global Temporary Assignment • Change Location • Change Manager • Global Transfer • Promote • Transfer	First day of the new active assignment
• End Assignment Termination • End Temporary Assignment • End Global Temporary Assignment • Termination	Last day of the current active assignment

For example, in a journey for the termination action let's see how the eligibility profile is evaluated and when task performers such as line manager and HR representative are notified of their tasks.

Action and Evaluation	Date
Terminate worker	27-Sep-2023
Last day of active assignment	27-Sep-2023
Inactive assignment start date	28-Sep-2023
Journey eligibility evaluated, task owner and performer determined	27-Sep-2023

What Happens When Offset Days is Specified

You can specify offset days for a task to determine when the task should be evaluated and when task owners and performers should be determined. Say you create a journey for the transfer action which is effective 17-Sep-2023. You have 3 tasks one each for the current manager, new manager, and HR representative. Let's see how the task assignment date changes for each task performer based on the offset values you specify:

Task Details	Task 1	Task 2	Task 3
Name	Complete Performance Appraisal	Set Development Goals	Orientation Session with New Employee
Task Performer	Line Manager	Line Manager	AoR (HR representative)
Offset Days	-3 days	1 day	4 days
Task assigned and notification sent to task performers on	14-Sep-2023	18-Sep-2023	21-Sep-2023
Task performer determined based on offset days	Current Line Manager	New Line Manager	New HR representative

Evaluate Journey Task Performers and Owners During Task Initiation

You can evaluate task performers and owners during task initiation instead of task allocation by selecting the Evaluate task performer and owner when task is initiated option when you configure a task. For more information, refer to this topic: *Can the journey task performer and owner be evaluated when the task is initiated?*

The evaluation during task initiation is applicable in these scenarios:

- When a task is dependent on another task.
- When a task is deferred based on a delay duration.
- When a journey is deferred based on days for initiation.

This table shows the application behavior for each use case when the option is disabled or enabled:

Use Case	Evaluate task performer and owner when task is initiated - Disabled	Evaluate task performer and owner when task is initiated - Enabled
When a task is dependent on another task. For example: • Task 2 is dependent on Task 1. • Task 2 performer is the line manager. • Line manager is changed before task 1 is completed.	Task performer and owner for the dependent task are evaluated as soon as the task is assigned. • Task 2 is assigned to the current line manager. • Even when the line manager changes, the task 2 performer continues to be the original line manager. • Notification is sent only when the task is initiated. In this case, it is sent to original line manager.	Task performer and owner for the dependent task are evaluated only when the preceding task is completed, and the dependent task is initiated or activated. • When the journey is assigned, task 2 appears as a disabled task since it's a dependent task. Task 2 is shown as assigned to the current line manager. • When task 2 is initiated, the task performer is re-evaluated as the changed line manager. • Task 2 is removed from the original line manager's list and is available in the changed line manager's list. • Notification is sent only when the task is initiated. In this case, it is sent to the changed line manager.
When a task is deferred based on a delay duration. For example: • Task A has a delay duration of 10 days. • Task A performer is the line manager. • Line manager is changed before the delay duration is reached.	Task performer and owner for the task are evaluated as soon as the task is assigned. • Task A is assigned to the line manager. • Even when the line manager changes, the task A performer continues to be the original line manager. • Notification is sent only when the task is initiated. In this case, it is sent to the original line manager.	Task performer and owner for the task are evaluated only when the task is initiated or activated. • When the journey is assigned, task A appears as a disabled task since it's a deferred task. Task A is shown as assigned to the current line manager. • When task A is initiated, the task performer is evaluated as the changed line manager. • Notification is sent only when the task is initiated. In this case, it is sent to the changed line manager.
When a journey is deferred based on days for initiation. For example: • Onboarding journey has the days for initiation configured as 5 days. • Tasks B and D in this journey have the line manager as the performer. • Line manager is changed before the journey is initiated.	Task performer and owner for all journey tasks are evaluated as soon as the journey is assigned. • Task B and D are assigned to the line manager. • Even when the line manager changes, task B and D performers continue to be the original line manager.	Task performer and owner for all journey tasks are evaluated only when the journey is initiated or activated. • When the onboarding journey is assigned, the performers for tasks B and D are evaluated as the current line manager. Tasks are displayed as disabled (tasks waiting to be assigned). • When the onboarding journey is initiated, the performers for tasks B and D are evaluated as the changed line manager.

How are journeys assigned?

An assigned journey is a specific instance of a journey template.

This table lists the different methods a journey and task can be assigned.

Type	Method	What's assigned?
Automated	Employment actions that includes actions such as, Add Pending Worker, Hire an Employee, Add a Contingent Worker, Create Work Relationship, and Local and Global Transfer.	Journey and tasks
	HCM Events that includes events such as, person data change, add absence, update marital status, and upload document record.	Journey and tasks
	Background processes that includes processes such as, Move to HR, and Convert Pending Workers.	Journey and tasks
	Workers REST is used to add new workers, update existing workers, and so on. The journey is then assigned to the workers created by REST API.	Journey and tasks
	Creating a nudge to trigger journeys.	Journey and tasks based on nudges
Manual	Assigning from the Journeys page by selecting single and multiple assignees.	Journey and tasks
	Using a filtered list.	Journey and tasks
	Creating a recurring survey journey.	Survey journey and task
	Creating a recurring journey.	Recurring journey and tasks
	Creating a contextual journey that can be started through a quick action (for example, Promote, Transfer, and so on).	Contextual journey and tasks
	Reassign task	Task
	Add task	Task
	Journey REST APIs (assignJourney, workerJourneys, workerJourneyTasks, and so on).	Journey and tasks
	Journey Allocation HDL (AllocateChecklist.dat)	Journey and task

Points to Consider

- Notifications aren't triggered when a journey is assigned using HCM Data Loader. You can explore a custom report to send out a generic notification or email for journey task assignees to review their tasks.
- When you enter a person name to assign the journey in the Person list of values (LoV), the search results display the person number and assignment status attributes in addition to the person name and business title. However, to see the assignment status attribute, you need to enable Oracle Search. For more information about setting up Oracle Search, see the topic in the Related Topics section.
- When a journey is manually assigned from the Journeys UI for a single person, the journey eligibility profile isn't evaluated. However, eligibility profiles are evaluated for the tasks in the journey.
- When a journey is assigned from the Journeys UI to multiple people at the same time, these things happen:
  - An ESS job is activated that evaluates eligibility for the journey and it's tasks.
  - The Mass Assign Journeys ESS process is internally run to process the multiple journey assignments.
- When a journey is assigned using HDL auto-allocation, the eligibility is evaluated using the AllowAutoAllocation attribute flag. If the attribute flag is set as Y (default value), then eligibility is evaluated at journey and task level.
- Journeys can only be assigned to persons of the type employee, contingent worker, nonworker, and pending worker. They can't be assigned to candidates who are in the offer stage.
- When there are no tasks for the journey assignee, the journey won't be visible to the journey assignee in the My Journeys tab. However, if the **Others Incomplete Tasks** property is set to **Show**, the journey will be displayed on the tab.
- If the user name is changed after the journey is assigned, the journey or task awaiting assignment (deferred) is still associated to the previous user name as of the task activation date.
- If the user tries to access the task notification after the user name is changed, the task details will be blank in the notification. Hence, the assigned task will have to be removed and added again to the assigned journey.
- The journey task doesn't get assigned to the future line manager or AoR for internal candidates. This is because the application checks for the line manager or AoR details only if the person type is that of employee, contingent worker, and pending worker. It doesn't check for nonworkers or candidates who are in the offer stage.
- For onboarding journeys, if you modify the start date of a new hire, the journey and task assignment dates won't change automatically. You will have to delete the assigned journey and manually reassign the journey.
- Self-assigned journeys are visible only for the person who assigned it to themselves. Additionally, these journeys aren’t available on the Assigned Journeys tab. However, the journey tasks for other performers are displayed on the My Tasks tab.
- If the tasks to be performed in a journey are for a worker, then it's recommended that you assign the journey to the worker and not to self. This is because, the tasks could be specific application tasks. In such scenarios, if the journey is assigned to self, you will be navigated to your application task instead of the worker's task. Similarly, if you have configured to store attachments in document records, then these attachments will get stored in your document records and not the worker's document records.
- Here are some points to consider when you assign journeys using filtered lists:
  - The mass allocation of journeys by using filtered lists is supported for alerts based journeys and not for BI Publisher based journeys.
  - The **Manage list of persons** link is displayed only if you have access to the Filtered Lists page.
  - This feature is available only on the Redwood Assign Journey page.
  - You must create a Filtered list from My Client Groups before it's available on the Redwood Assign Journey page. While creating the filtered list, ensure that you select Journeys in the Subscriber field.

- A preview of the list of workers who satisfy the conditions in the Filtered List configuration is available on the Filtered Lists page and not on the Redwood Assign Journey page.

Related Topics

- How do I hide inactive worker assignments when assigning journeys?
- Can a user go back to the Explore tab after assigning the journey?
- How do I enable guided journey tasks in an assigned journey task?
- How do I create a filtered list to assign journeys?

How can I use journeys?

Journeys is a one-stop place that's meant to guide workers step-by-step as they transition through changes such as getting married, being promoted, or onboarding. You can use the Journeys app to go to the Journeys landing page.

Here's what you can see and act on when you access the different tabs in the Journeys app, based on your role.

Line Manager and HR Specialist	Employee
Explore	
You can see predefined and personal journeys. Additionally, you can create a new journey and add it to your personal journey library. When you drill-down to the journey, you will see actions based on your security privileges.	This tab isn't available to employees by default. However, you can grant access to the tab by configuring the required security privileges.
My Journeys	
You can see journeys assigned to you and public journeys assigned to employees. You can also see tasks assigned to other task performers as part of your assigned journeys in the Others' tasks section. This is if you enable the section to be displayed by using display properties.	You can see public and private journeys assigned to you. You can also see tasks assigned to other task performers as part of your assigned journeys in the Others' tasks section. This is if you enable the section to be displayed by using display properties.
My Tasks	
You can see tasks you need to perform as part of your journeys as well as others journeys. The My Tasks tab doesn't show the tasks in the sequence that they are configured in the journey template. This is because the tab contains tasks from multiple journeys.	You can see tasks you need to perform as part of your journeys as well as others journeys.
Assigned Journeys	
This tab is available when Oracle Search for Journeys isn't enabled. This is a shared tab for Line Managers and HR professionals.	The Assigned Journeys tab isn't available for employees.

Line Manager and HR Specialist	Employee
Explore	
You can see journeys assigned to your team. You can force close, delete, or edit an assigned journey if your administrator has given you the required privileges.	
Team Journeys	
This tab is available only if Oracle Search for Journeys is enabled. This is available only for Line Managers. You can see journeys assigned to your team. You can force close, delete, or edit an assigned journey if your administrator has given you the required privileges.	The Team Journeys tab isn't available for employees.
Organization Journeys	
This tab is available only if Oracle Search for Journeys is enabled. This is available only for HR professionals. You can see journeys assigned to the people you manage. You can force close, delete, or edit an assigned journey if your administrator has given you the required privileges.	The Organization Journeys tab isn't available for employees.
Activity	
You can view the journey activity details for the selected journey template when you navigate directly from the journey card on the Explore tab. On the Activity tab, you can view the allocation status. You can drill-down to the journey details page to see the assignment details. You can also navigate directly to the Activity tab from the journey details page. You can view the Purged status for journeys that are purged in the application. When you filter journeys in the Activity tab by status Completed, you see completed and purged journey records. However, when you filter by status Purged, you don't see any journey records. A message is displayed that the journey activity details have been purged when you access a purged journey. Assigned journeys that are purged aren't displayed in the Activity tab. If you navigate to the Activity tab for a specific journey from the Explore tab or journey details page, you can't search for other journeys on the Activity tab. You can monitor the progress and status of an assigned journey when you mass assign a journey to multiple people in a single transaction.	Not available

Line Manager and HR Specialist	Employee
Explore	
The list of assigned journeys on the Activity tab will automatically be purged after 180 days from the date they were assigned. This however has no impact on the assigned journey as such. Also, your administrator can specify the duration after which the list should be purged. If you assign a journey to a single person from the Assign Journeys tab, the assigned journey isn't displayed on the Activity tab. However, if you assign a journey to a person's directs or organization that has only 1 worker, then the assigned journey is displayed on the Activity tab. When you select a journey from this tab and go to the journey details page, you can use the Response Summary option to review and analyze journeys. For example, you can see how many journey assignees completed their journeys or how many task performers completed their tasks. You can view the summarized journey details in the form of a pie chart, donut chart, or vertical bar graph. **Note:** The Response Summary option is available only if Oracle Search for Journeys is enabled.	

The **applyPersonalFilter** Visual Builder (VB) page property controls the defaulting of the personal filter chip on the Explore tab in journeys. The default value of the property is true which means the Personal filter chip will be applied by default. If you select the property value as false, then by default the personal filter chip won't be applied.

In addition to the Journeys app, you can also use the Assigned Journeys quick action to open a standalone page that displays all the journeys assigned to the selected worker. To use the quick action, you need to turn on the Workers List of Values (LoV) that's enabled with the Oracle Search feature. The quick action is hidden by default and you need to enable it by using the Structure menu.

By default, the search on these tabs displays results with the Starts With operator. This is controlled by the ORA_PER_JRNY_SEARCH_STARTSWITH profile option that is set to Y by default.

Contact and Work Info Display

This table describes the contact and work information displayed to various journey actors.

Attribute	How is it configured?	Can the display be controlled?	Where is it displayed?	Who can see it?
Get in touch	My Client Groups **>** Journeys Setup **>** Journey Templates **>** Overview tab **>** Get in touch	The attribute can't be controlled through display settings. If you don't want to show the attribute to the journey	Displayed as Contact Us under My Journeys **>** specific assigned journey.	Only the journey assignee. This attribute isn't displayed to any other actors in the journey.

Attribute	How is it configured?	Can the display be controlled?	Where is it displayed?	Who can see it?
		assignee, it shouldn't be configured in the journey template.		
Contact Us	The attribute isn't configured on the journey template. It contains information about the Line Manager and Areas of Responsibility of the journey assignee.	The attribute can be controlled through the Contact Us display setting at the journey template level.	Displayed as Contact Us under Assigned Journeys **>** specific worker's journey.	All actors who have access to the assigned journey of the worker. This attribute isn't displayed to the journey assignee.
Contact Info	Checklist Template **>** Tasks tab **>** Specific Task **>** Task Owner	The attribute can be controlled through the Contact Information display setting at the task level.	Displayed as Contact Info for a specific journey task.	All actors who have access to the task.
Work Info	The attribute isn't configured on the journey template. It contains information about the assignment of the journey assignee.	The attribute can be controlled through the Work Info display setting at the journey template level.	Displayed as Work Info under Assigned Journeys **>** specific worker's journey.	All actors who have access to the assigned journey of the worker. This attribute isn't displayed to the journey assignee.

Your Task Actions in Assigned Journeys

All tasks display two most relevant actions **Done** and **Not Applicable** on the task. Based on the task type, the actions that display will vary. Actions that are common to most tasks such as Add to Calendar, Save as Draft, Start (for OPA task type), and See Status (for both OPA and I-9 task types) appear under the **More Actions** drop-down list. This table lists the task actions you can perform:

As a Line Manager and HR Specialist	As an Employee, Contingent Worker, and Pending Worker
• Add predefined tasks from the task library. • Add new tasks of the type Document, External URL, Learn Community, Learn Enrollment, Manual, and Video. • View progress of tasks assigned to you, the journey assignee, and other users • View tasks that are yet to be assigned and are deferred.	• View progress of your tasks by status, that's completed or overdue. • Save the task as draft. • View the questionnaire and configurable form responses in read-only mode once these tasks are completed.

As a Line Manager and HR Specialist	As an Employee, Contingent Worker, and Pending Worker
• Send reminders on tasks. Employees receive a notification of the same. • View the questionnaire and configurable form responses in read-only mode once these tasks are completed. • View the Work Info section for workers. You can edit a task in an assigned journey only if your administrator has given you the required privileges.	

A user can mark the task as Done only if they have clicked these links in the task:

- Go to application task in an Application task
- Go to website in an External URL task
- Go to website in an I-9 Verification task
- Go to website in a DocuSign task
- See document in a Native Electronic Signature task
- See document in a Report task
- Launch learning community in a Learn Community task
- Start learning in a Learn Enrollment task

This table answers some common journey task related questions that you may have when you assign journeys:

Question	Answer
Can I select multiple tasks and take action in journeys?	Yes. If you use journeys, you can select multiple tasks to reassign, reopen, or send reminders from these pages: • Reassign ○ Journeys > My Tasks ○ Journeys > Assigned Journeys > My Tasks ○ Journeys > Assigned Journeys > Employee Tasks ○ Journeys > Assigned Journeys > Others' Tasks • Reopen ○ Journeys > Assigned Journeys > My Tasks ○ Journeys > Assigned Journeys > Employee Tasks ○ Journeys > Assigned Journeys > Others' Tasks • Send Reminders ○ Journeys > Assigned Journeys > Employee Tasks

Question	Answer
	◦ Journeys > Assigned Journeys > Others' Tasks Here are some points to note: • At a time, you can select a maximum of 10 tasks to take any action. You can reassign and send reminders for incomplete tasks and reopen only completed tasks. • You can't perform these actions for journeys where you're the journey assignee. • You can't send reminders for tasks where you're the performer. • You can't select multiple tasks when using journeys on a mobile device.
Can tasks be added to a deferred journey?	Yes. Additionally, the task can be edited or removed.
How can tasks be added for pending workers in journeys?	The task performer list of values (LoV) in the task needs to be left blank when you are adding the task to the assigned journey of the pending worker.
Can multiple tasks be selected and marked as complete?	No, because the tasks types can be different. For example, certain tasks such as signing a document or updating personal information can be marked complete only by the worker who's the task performer.
Can I see the assignment status of an employee when assigning a journey?	When you search a person to assign the journey, the search results display the assignment status attribute in addition to other attributes. However, to see the assignment status attribute, you need to enable Oracle Search. For more information about setting up Oracle Search, see the topic in the Related Topics section.

Navigation to Journey Task Page from Notifications

When the user clicks a link in the task notification, they are redirected to the journey task page. The user can navigate to the specific task directly from the task notification, such as Email, Bell, Things to Finish, and BPM Worklist.

However, they can navigate back to the assigned journey page to view all tasks by using the back button on the page header, if the user has access to the journey.

The display of the back button is controlled through the **showBackButton** page property in Visual Builder Studio (VB Studio).

If the property is set to **true**, then the user will see the back arrow and be able to navigate to the assigned journey directly from the task page.

If the property is set to **false**, then the user won't see the back arrow and can't navigate to the assigned journey directly from the task page.

Related Topics

- How do I enable Oracle Search for HCM?

How do I configure alert notifications for default and user-defined content for journeys and tasks?

To configure alert notifications for journeys, follow these steps:

1. On the home page, click the **My Client Groups** tab.
2. Click **Show More** under Quick Actions.
3. Click the **Journey Templates** quick action in the Journeys Setup area.
4. Click the journey name where you want to configure alert notifications.
5. Click the **Notifications** tab and ensure that the processing mode is **Alerts based notification**.
6. Click the **Edit Notifications** pencil icon.
7. Enable the **Send notification when Journey is assigned** option.
8. If you want to use the default seeded notification title and description, select **Default content** from the **Content Type** list of values (LoV).

   The read-only Title and Description fields are populated.
9. If you want to modify the default seeded content, select **User-defined content** from the **Content Type** LoV.

   The editable Title and Description fields are populated where you can make changes to the default content.
10. If you want rich content, select **User-defined alert template** from the **Content Type** LoV.

    Select your custom template for the notification type.
11. Enable the **Send notification when Journey is force completed** option.
12. Repeat steps 8 through 10 and click **Save**.

To configure alert notifications for journey tasks, follow these steps:

1. Click the **Overview** tab.
2. In the Tasks section, click the **Edit** icon for the task where you want to configure alert notifications.
3. Complete the required fields in the Overview tab.
4. Click the **Notifications** tab.
5. In the Notification overrides section, click the **Edit** icon for the task notification type you want.
6. Enable the **Notify Performer** option.
7. If you want to use the default seeded notification title and description, select **Default content** from the **Content Type** LoV.

   The read-only Title and Description fields are populated.
8. If you want to modify the default seeded content, select **User-defined content** from the **Content Type** LoV.

   The editable Title and Description fields are populated where you can make changes to the default content.
9. If you want rich content, select **User-defined alert template** from the **Content Type** LoV.

   Select your custom template for the task performer.
10. Click **Save**.
11. Enable the **Notify Owner** option.
12. Repeat steps 7 through 9 and click **Save**.
13. In the Reminders section, enter or select the fields values as required.
14. Repeat steps 7 through 9 and click **Save**.

How do I schedule a recurring journey with a repeat frequency?

You can schedule a recurring journey such as a survey by including the repeat frequency of the journey.

For example, you can schedule a survey journey to repeat on the first Monday every 3 months. 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 **Journey Templates** quick action in the Journeys Setup area.
4. Click the survey journey name where you want to schedule the repeat frequency.
5. Click the **Advanced** tab and click **Add** in the Schedule section.
6. In the Schedule panel drawer, select or enter these values as applicable.

Field	Value
Repeat	Calendar month
Repeat Frequency	3
Week of Month	First
Day of Week	Monday
Start Date	5/6/25
Number of Runs per Period	Every day of the period
End Recurrence	Number of occurrences
Number of Occurrences	3

7. Click **Generate**. The periods in the schedule with their start and end dates are displayed.
8. Click **Save**.

How do I configure a task to display details of a preceding completed task?

Consider this example where a line manager wants to share feedback with the employee about the onboarding process. The manager creates a questionnaire feedback task and an acknowledgment task to be filled in by the employee.

You need to configure the acknowledgment task so that the employee can select to view the feedback task. 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 **Journey Templates** quick action in the Journeys Setup area.
4. Click the journey name where you want to configure a task to display its preceding task.
5. In the Tasks section, click the **Edit** icon for the task where you want to configure the preceding task.
6. Click the **Advanced** tab.
7. Select or enter these values as applicable. For other fields, enter suitable values or use default values.

Field	Value
Preceding Task	Select name of preceding task
Display preceding task	Yes
View Preceding Task	Enter a custom label or retain default label

8. Click **Save**.

After you configure the task, the manager can assign the journey to the employee. The comments and attachments added by task performer in the preceding task is visible to the user viewing the preceding task. When the manager completes the feedback task in the journey, the employee has an option to view the feedback task before they complete the acknowledgment task.

How do I configure additional context to preview guided journeys?

You can directly pass parameter token values for a path in a guided journey task from the preview page.

For example, you can configure the parameter in the path of a custom OTBI report from an OTBI Analysis task. When you pass the value for the parameter from the additional context of the guided journey preview, you can see the OTBI report based on the value that you passed.

1. On the home page, click the **My Client Groups** tab.
2. Click **Show More** under Quick Actions.
3. Click the **Journeys Setup** quick action in the Journeys Setup area.
4. Click the **Guided Journey** card.
5. Click the guided journey name where you want to configure additional context for a task.
6. In the Overview tab, Tasks section, click the **Edit Task** icon for the Analytics task where you want to configure the OTBI report.
7. In the Overview tab, enter the OTBI Analysis path with the token that you need to pass from the additional context.
8. In the journey details page, click **Preview**.
9. Click **Additional Context** and click **Add**.
10. Enter the Key value. For example, enter **PositionId** if the OTBI Analysis path for your Analytics task was the following URL:

    ```
    /shared/Custom/Human Capital Management/Global HR/Position Jobs&col1="Workforce Management - Position
     Real Time"."Position Identifiers"."Position Id"&val1={PositionId}
    ```

11. Enter the value. For example, enter **17**.
12. Click the **Save** icon and click **Apply**.

After you configure the additional context for the guided journey task, the user can preview their OTBI Analysis based on the parameter value passed for the Additional Context.

How do I configure the workflow agent task type in an external guided journey?

Follow these steps:

1. On the home page, click the **My Client Groups** tab.
2. Click **Show More** under Quick Actions.
3. Click the **Journeys Setup** quick action in the Journeys Setup area.
4. Click the **Guided Journey** card.
5. Click the guided journey name where you want to create the workflow agent task type.
6. In the Overview tab, ensure that the **Allow access for external users** field in the **Basic details** section is set to **Yes**.
7. In the **Tasks** section, click **Add**.
8. In the Overview tab, enter the task name.
9. Select the **Agent** task type and the **Workflow Agent** type.
10. Select the workflow agent and click **Save**.

After you configure the workflow agent type for a task in an external guided journey, and the guided journey containing this task is associated with a Redwood page, the user can interact with the application and use multi-agent workflows.

How do I associate guided journey tasks with a journey task?

Follow these steps:

1. On the home page, click the **My Client Groups** tab.
2. Click **Show More** under Quick Actions.
3. Click the **Journey Templates** quick action in the Journeys Setup area.
4. Click the journey name for whose task you want to associate guided journey tasks.
5. In the Overview tab, Tasks section, click the **Edit** icon for the task where you want to associate guided journey tasks.
6. Click the **Advanced** tab.
7. Select the guided journey from the **Guided Journey** list of values (LoV). The tasks of the selected guided journey will be auto populated in the **Journey Tasks** field.
8. Select the guided journey tasks that you want one task at a time.
9. 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.

How do I configure the access level property for a journey template?

Follow these steps:

1. On the home page, click the **My Client Groups** tab.
2. Click **Show More** under Quick Actions.
3. Click the **Journey Templates** quick action in the Journeys Setup area.
4. Click the journey name where you want to configure the access level property.
5. Under the Overview tab, Basic details section, click the **Edit Basic details** icon.
6. Select the access level that you want.
   Select the **Assignee Only** value if you want to make the assigned journey as private and the **User with Assignee or Journey Template Access** value if public.
7. Click **Save**.

How do I restrict assigning a journey when it's in progress?

Follow these steps:

1. On the home page, click the **My Client Groups** tab.
2. Click **Show More** under Quick Actions.
3. Click the **Journey Templates** quick action in the Journeys Setup area.
4. Click the journey name where you want to configure the restrict option.
5. Click the **Advanced** tab.
6. Under the Additional details section, enter the details.
7. Select **Yes** in the **Restrict assigning journey if it's in progress** list of values (LoV).
8. Click **Save**.

What attributes determine journey or task assignment?

This table lists the differences in journey or task assignment based on the days for initiation, delay duration, and offset days values.

Points to Consider for Journey Assignment	Days for Initiation	Delay Duration	Offset Days
Applicable at the journey level?	Yes	No	No

Points to Consider for Journey Assignment	Days for Initiation	Delay Duration	Offset Days
Applicable at the task level?	No	Yes	Yes
Are there any dependencies?	Yes. This attribute is available only when the Allocation Criteria is set to **When the action record becomes effective**.	No	No
Does this attribute have a default value?	Yes, default value is 0.	No, default is null.	Yes, default value is 0.
What values to configure?	Only days can be provided. Other units of measure aren't supported.	Days and unit of measure need to be provided. Supported units of measure are days, months, and weeks.	Only days can be provided. Other units of measure aren't supported.
Can the attribute value be negative?	Yes	No	Yes
How is the attribute used?	The attribute value is added to the effective date of the transaction record (for example, effective date of the transfer record).	The attribute value is added to the journey assignment date. If you specify delay duration for a task that has a preceding task, then the delay duration is calculated from the date on which the preceding task is marked as complete.	The attribute value is added to the journey assignment date.
Which date is derived using this value?	Journey activation date.	Task activation date.	Task offset date.
How is the derived date used?	The journey becomes active on the derived date.	The task becomes active on the derived date. This date doesn't determine the date on which these attributes are evaluated. The attributes are always evaluated on the journey assignment date.	These task attributes are evaluated on the journey assignment date. However, the reference date used for evaluation is the task offset date. • Task eligibility profile • Task performer (line manager and area of responsibility) • Task owner (line manager and area of responsibility) For example, the journey is assigned on 1-Sep-2023. Task A in the journey has the offset days set to 10 days. The attributes are evaluated on 1-Sep-2023 (when the journey is assigned). However, the reference date used for evaluation is the task offset date, which in

Points to Consider for Journey Assignment	Days for Initiation	Delay Duration	Offset Days
			this case would be 11-Sep-2023 (1-Sep-2023 plus 10 days). If Offset Days isn't specified, then the task assignment date is used as the reference date to evaluate the attributes. This derived date doesn't determine when the task becomes active or visible on the user interface.
What displays on the user interface until the derived date?	Workers don't see the assigned journey until the derived date. Managers and HR specialists see the assigned journey with the Deferred status. They can delete or edit this deferred journey. But they can't force complete this deferred journey.	Workers don't see the assigned task until the derived date. Managers and HR specialists see the assigned task with the date it will become active on. If journeys is enabled, then this future start date isn't displayed on the page. They can delete or edit this deferred task. But they can't complete this deferred task.	There's no impact on the user interface.
What is the impact on notifications?	Notifications are sent only when the journey becomes active. Notifications are triggered at UTC midnight when the journey becomes active. The timing of triggering notifications isn't dependent on a user's time zone preferences.	Notifications are sent only when the task becomes active. Notifications are triggered at UTC midnight when the task becomes active. The timing of triggering notifications isn't dependent on a user's time zone preferences.	There's no impact on notifications.
What are the typical use cases?	When you want to assign the journey only a few days before or after the effective date of the transaction. For example, a worker's hire date is 1-Sep-2023. However, the pending worker record is created on 1-Jun-2023. You want the worker to start preboarding tasks and the journey to be active only 10 days before the hire date, which is 21-Aug-2023. In this case, you configure days for initiation as -10.	When you want the task performer to start a task a few days after the journey assignment date. For example, the Complete Company Culture & Values Reflection Exercise task needs to be active for the worker only 10 days after the journey assignment date of 1-Sep-2023. In this case, you configure the task delay duration as 10 days. So, the task will be active only on 11-Sep-2023 (1-Sep-2023 + 10 days).	When you want to evaluate the task performer or owner either few days before or after the effective date of the transaction. For example, a worker is being transferred on 17-Sep-2023. However, the Orientation Session for New Employee task needs to be performed by the HR representative of the new assignment 4 days after the transfer. In this case, you configure the task offset days as 4 days so

Points to Consider for Journey Assignment	Days for Initiation	Delay Duration	Offset Days
			that the new HR representative is evaluated as of 21-Sep-2023 (17-Sep-2023 + 4 days) and the task is assigned to them.

How do I configure journey notifications?

When you assign a task, you can notify task owners and performers. You configure the notification for a task in the Notifications and Reminders tab.

Override Task Notifications

A notification is sent to the task performer every time you assign or reassign a task. You can deselect Performer in the Notification Overrides section to stop sending these notifications. However, for other task updates you must specifically configure the notifications that you want to send the task owner or performer.

Override Notification Templates

You can use predefined alert templates in your journeys to notify task owners and performers for events related to absence, health and safety, learning, person, recruiting, and talent. For journeys which are based on an employment action or which are non-event based, BIP notifications are sent. If you want, you can modify the journeys and replace the BIP notifications with alerts. You must create a custom alert template by copying the seeded alert template and associate the custom alert template to the appropriate notification for a journey or task.

Prevent Task Status Update from Notifications

It's possible that task performers may update the journey task status directly from a task notification. To prevent that, you can specify Hide for either Mark as Complete or Mark a Task as Not Applicable when configuring task display properties in the Display Properties tab. This hides both these action buttons in the task notification.

All journey task notifications which require the task performer to mark the action as Complete or Not Applicable are in the Assigned status. When the performer acts on the task notification and clicks either Complete or Not Applicable, the task notification status changes to Complete. Similarly, all FYI journey task notifications are in the Assigned status too, but the status of such FYI notifications changes to Complete only when the user explicitly clicks on Dismiss in the task notification.

When an Area of Responsibility (AoR) is configured as a task performer and the AoR contains multiple members, action buttons aren't available in the email and bell notifications.

Send Task Notifications

Individual notifications are sent for tasks, by default. However, if you don't want users to receive individual notifications you can enable **Combine task notifications** on the Display Properties tab to send a single combined notification summarizing all the task notifications. If you enable this setting, both actionable and FYI notifications are summarized in the notification. However, if there are any task actions to do after the combined notification is sent for the day, those notifications are sent as separate (or individual) notifications.

Send Notifications on Journey Allocation and Force Completion

The **Send notification on checklist allocation** setting on the Display Properties tab is enabled by default. This sends the journey assignee a notification when a journey of non-enterprise onboarding category is allocated. Since there's no default notification template associated for non-enterprise onboarding category journeys, you need to configure a custom alert and associate it in Template for Assigned Checklist on the Message tab.

When the **Send notification when checklist is force completed** setting is enabled it sends a notification to the journey assignee when a journey is force completed. Although you can't override the seeded template that's used to send this notification, you can modify the seeded template and use it.

Points to Consider About Alert Notifications

- Data related: Here is a point to note:
  - All event alerts and tokens are predefined by the product teams and seeded in the application. The user can't include additional tokens or fields in an event alert and only delivered tokens available in the seeded event alert are supported.
- Personalization related: The user can't do these actions:
  - Add tables and links in alert templates.
  - Modify only the token font. You need to modify the font for the whole sentence or text.
  - Brand alerts.
- Other considerations: Here are some more actions that the user can't do:
  - Copy event based alert templates.
  - Use Functional Setup Manager (FSM) to migrate journey alert templates that are attached to seeded alerts.
  - Perform actions on alert notifications because they are only for your information (FYI).
  - Claim when the alert is sent to multiple people (for example, AoR).
  - Can't remove the FYI prefix.
  - Use BPM alias for home email.

How do I delegate access for journeys and tasks?

Priya Krishnan is a Line Manager who wants to delegate her journeys and tasks access to her peer Megan Miller before proceeding on a long leave.

This example assumes that Priya has the role named Vision_Journeys Manager having the Manage Journey By Manager duty role. After this custom role is delegated to Megan, she will be able to access journeys and tasks.

Enable Delegation and Add Security Profiles for Custom Role

1. In the Setup and Maintenance work area, search and select the **Manage Data Role and Security Profiles** task.
2. Search and select the **Vision_Journeys Manager** custom role you created.

3. In the Search Results area, click the **Edit** icon.
4. On the Role Details page, select the **Delegation Allowed** check box and click **Next**.
5. On the Security Criteria page, in the Public Person area, search and select **View All People** for the Person Security Profile.
6. Click **OK**.
7. Click **Review** and review the details.
8. Click **Submit**.

Delegate the Custom Role to Megan

1. On the home page, click the **Me** tab.
2. Click the **Roles and Delegations** app.
3. In the **Role Delegations** area, click **Add**.
4. Select the **Vision_Journeys Manager** custom role and the start date.
5. Select Megan to delegate the custom role, and click **Save**.

   After these steps, Megan can access the Journeys app.

> **Note:**
> - Megan won't receive any journey or task notifications. Notifications will continue to be sent to Priya. However, Megan can access the journeys and tasks from the Journeys app.
> - Only roles that have the **Delegation Allowed** check box enabled appear in the list of roles to delegate.
> - Only roles that have been directly assigned to a user can be delegated by the user. A role that is part of another role and not directly assigned to a user can't be delegated, even if the **Delegation Allowed** check box is enabled for that nested role. For example, the Vision_Journeys Manager role assigned to the user. The Vision_Document Records Manager role is part of the Vision_Journeys Manager role. In this case, the Vision_Document Records Manager role can't be delegated by the user.
> - The person to whom a role is delegated can't further delegate that role. For example, if Priya has delegated a role to Megan, Megan can't delegate that role.

Related Topics

- What's a delegated role?
- Role Delegation
- Configure Access to List of Proxy Users in Role Delegation
- How You Enable Delegation for a Role

How do I configure the Analytics task type in journeys?

The Analytics task action type in a journey enables task performers to view an OTBI analysis 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 that you provide task performers access to the OTBI analysis, otherwise they can't view the analysis.

Task Type Use

- Specify the OTBI analysis path and parameter to display analytics.
- When setting up the task, you can specify the type of analysis parameters you want to pass at run time. You need to pass the parameters in the **OTBI Analysis Path** field with the name of the attribute in the OTBI subject area along with the object name.

Task Type Example

View the analysis displaying person journey details in a guided journey task. The OTBI Analysis path for this example would be something like this:

```
/shared/Custom/Human Capital Management/Person Checklist Details/Checklist Category
 Heatmap&col1="Worker"."Person ID"&val1={PersonId}
```

Here's another sample URL that passes the Assignment ID and Person ID parameters:

```
/shared/Custom/Human Capital Management/Workflow Notifications/Checklist Category
 Heatmap&col1="Worker"."Assignment ID"&val1={AssignmentId}&col2="Worker"."Person ID"&val2={PersonId}
```

Here are a few points to consider about the Analytics task type:

- Currently, only the Person ID and Assignment ID parameters are supported on HCM pages.
- It's available only for guided journeys.

What are the supported task types in guided journeys?

Task types determine the type of journey task, the task performer needs to complete. This table shows the supported task types that you can configure in guided journeys:

Task Type	What You Use it For	When is Task Complete	Example
Agent	Allow employees to directly interact with the Artificial Intelligence (AI) platform. You can include these agent subtypes: • RAG Agent – Retrieves relevant documents or data from a knowledge source and creates a coherent and contextually relevant answer based on the retrieved information.	User views the answers on the guided journey task window.	Managers can type a question to find the promotion policies in their organization when promoting employees of a certain grade.

Task Type	What You Use it For	When is Task Complete	Example
	• Workflow Agent – Uses multi-agent workflows to find relevant answers. This task type is available only for page-level guided journeys.		
Analytics	Specify the OTBI report path and parameter to display. This task type is available only for guided journeys. See the topic, *How You Configure Analytics Task Type in Journeys*	User views the analysis on the guided journey task window.	View the analysis displaying person journey details in a guided journey task.
Document	Attach a document that workers can download, see, and read as part of their tasks. You can preview various attachments in journey tasks without having to download them to a local folder. You can't preview the attachment uploaded to a document task type when viewing the document task on the journey details page from the Explore tab.	User clicks the Done or Complete button.	Download insurance form, print (optional), fill up or enter details, scan (if printed) the form and upload as attachment. The attachment preview can be seen when viewing these pages: • The document task type in an assigned journey. • The completed tasks in an assigned journey where attachments are uploaded by the performer.
Embedded Learning	Include learning content to help a task performer in their journey. You can include these content subtypes: • Document • Video	User clicks the Done button after they view the complete video in an embedded learn video task or after they have clicked the See document link in an embedded learn document task.	Training video that an employee needs to watch as part of their new hire onboarding process.
External URL	Define an external URL that workers will use to perform the task. You can create an URL that includes specific parameters or create the URL using the Manage Integration of Additional Applications task in Setup and Maintenance. See the topic, *How You Configure the URL for an External URL Task Type in Journeys*	User is taken to another page to do the task but revisits the task page to mark the task as done or complete.	Link to the benefits provider site.
Manual Task	Create a task that workers need to perform outside of the application.	User clicks the Done or Complete button.	Introduce the new hire to the team.
Questionnaire	Add a questionnaire to collect feedback from workers.	User clicks the Done or Complete button.	Onboarding survey, exit questionnaire, collect information.

Task Type	What You Use it For	When is Task Complete	Example
	You use the questionnaire functionality in HCM to create a questionnaire and select the appropriate subscriber depending on one of these journey categories: • Guided Journey - Guided Journeys • Survey (General) - Journey Surveys • Survey (Touchpoints) - Touchpoints • Other categories - HR Checklists The data collected using a questionnaire is available only within that questionnaire. You can create a custom BI report to fetch that data for display. To view and answer questions in a questionnaire, you need to add the HRT_MANAGE_ QUESTIONNAIRES_PRIV privilege to your custom roles which need to access the questions in the journey task.		
Report	Specify and include a link to a published BI report. See the topic, *How You Configure the Report Task Type in Journeys*	User is taken to another page to do the task but revisits the task page to mark the task as done or complete.	Report that has all the employee details such as personal and assignment details for employee review.
User Defined Content	Display custom content from external end points in guided journeys. You can define a guided journey task by using this task type and connect a custom REST API. This task type is available only for Guided Journeys. See the topic, *Configure User Defined Content Task Type for a Guided Journey*	User is taken to a panel drawer on the same journey page to do the task.	Global salary analysis for an employee based on their career level matrix.
Video	Add a video using either an Embedded URL or a Media URL for a video. • Embedded URL: Supports videos hosted on media servers that support an embed format. • Media URL: Supports videos hosted on media servers that don't support the embedded	User clicks the Done or Complete button.	Welcome video from the CEO to address new hires in the organization. Example of an Embedded URL on YouTube, `https://www.youtube.com/embed/tsl5Zsbk8VQ` Example of Media URL and how you build the syntax of the URL:

Task Type	What You Use it For	When is Task Complete	Example
	format. For example, Oracle Universal Content Manager (UCM).		Link to access UCM: `https://<pod URL>/cs` When adding a media file from UCM, the link is generic. Example: `<generic internal URL>/cs/groups/fafusionimportexport/documents/digitalmedia/ytaw/mtu1/~edisp/ucmfa00155968.mp4` You need to replace the part that says generic internal URL with your actual pod URL. The media URL for a video hosted in UCM will be something like this: `<actual pod URL>/cs/groups/fafusionimportexport/documents/digitalmedia/ytaw/mtu1/~edisp/ucmfa00155968.mp4`

What are the task types in journeys?

Task types determine the type of journey task, the task performer needs to complete.

These are the task types you can configure:

Task Type	What You Use it For	When is Task Complete	Example
Advanced Task	Combine 3 task types into a single task. The task types you can combine are listed here: • Document • External URL • Application Task • Video • Embedded Learning • Questionnaire • Configurable Form • Electronic Signature • Report • Learn Community	User clicks the Done or Complete button	Watch a video, complete a survey, and sign a document as part of onboarding.

Task Type	What You Use it For	When is Task Complete	Example
	• Learn Enrollment When configuring electronic signature, if you want the user to sign the document, you need to select the Report task type and provide the report path. Then specify the Document Type to indicate where the signed document needs to be saved. See the topic, *How You Create an Advanced Task in Journeys*		
Agent	Allow employees to directly interact with the Artificial Intelligence (AI) platform. You can include these agent subtypes: • RAG Agent – Retrieves relevant documents or data from a knowledge source and creates a coherent and contextually relevant answer based on the retrieved information. • Workflow Agent – Uses multi-agent workflows to find relevant answers. This task type is available only for guided journeys.	User views the answers on the guided journey task window.	Managers can type a question to find the promotion policies in their organization when promoting employees of a certain grade.
Analytics	Specify the OTBI report path and parameter to display. This task type is available only for guided journeys. See the topic, *How You Configure Analytics Task Type in Journeys*	User views the analysis on the guided journey task window.	View the analysis displaying person journey details in a guided journey task.
Application Task	Select a task from a list of tasks that can be performed within the application itself. You can select the task based on the performer of the task. See the topic, *Example of Configuring Completion Criteria for a Journey Task*	User is taken to another page to do the task but revisits the task page to mark the task as done or complete.	Update personal details.
Configurable Form	Define configurable forms and capture additional details. Although the details will be captured using the form, the information won't be updated in the respective fields of the application.	User clicks the Complete button.	Fill forms related to corporate policy, tax.

Task Type	What You Use it For	When is Task Complete	Example
	See these topics: • *How You Create Configurable Forms in Journeys* • *Journey Descriptive Flexfields*		
Document	Attach a document that workers can download, see, and read as part of their tasks. You can preview various attachments in journey tasks without having to download them to a local folder. You can't preview the attachment uploaded to a document task type when viewing the document task on the journey details page from the Explore tab.	User clicks the Done or Complete button.	Download insurance form, print (optional), fill up or enter details, scan (if printed) the form and upload as attachment. The attachment preview can be seen when viewing these pages: • The document task type in an assigned journey. • The completed tasks in an assigned journey where attachments are uploaded by the performer.
Electronic Signature - DocuSign	Create tasks where workers can electronically sign during the onboarding process. Allows users to electronically sign the document in DocuSign. Requires integration with third-party service provider, DocuSign. See the topic, *Configure Electronic Signature Using DocuSign in Journeys*	User is taken to another page to do the task but revisits the task page to mark the task as done or complete.	Sign a non-disclosure agreement.
Embedded Application Task	To embed task regions within a journey task to easily complete application tasks and reduce navigation.	User is directly taken to the Journeys page to do the task and mark the task as done or complete.	• Update document record details. • Update address details.
Embedded Learn	Include learning content to help a task performer in their journey. You can include these content subtypes: • Document • Video	User clicks the Done button after they view the complete video in an embedded learn video task or after they have clicked the See document link in an embedded learn document task.	Training video that an employee needs to watch as part of their new hire onboarding process.
External URL	Define an external URL that workers will use to perform the task. You can create an URL that includes specific parameters or create the URL using the Manage Integration of Additional Applications task in Setup and Maintenance. See the topic, *How You Configure the URL for an External URL Task Type in Journeys*	User is taken to another page to do the task but revisits the task page to mark the task as done or complete.	Link to the benefits provider site.

Task Type	What You Use it For	When is Task Complete	Example
I-9 Verification	Enables users to update or verify personal details during I-9 employment eligibility verification (US specific only) using HireRight. See the topic, *Example of Integrating Journeys with HireRight for I-9 Employment Eligibility Verification*	User is taken to another page to do the task but revisits the task page to mark the task as done or complete.	Verify employment eligibility during onboarding.
Learn Community	Associate the learn community task type to the title of a predefined learning item.	User clicks the Done button.	Join a community for new hires.
Learn Enrollment	Associate the learn enrollment task type to any of these predefined learning items: • Course • Learning Journey • Offering • Specialization	User clicks the Done button.	Enroll for a specialization in programming.
Manual Task	Create a task that workers need to perform outside of the application.	User clicks the Done or Complete button.	Introduce the new hire to the team.
Native Electronic Signature	Create a task where workers can provide their consent by entering their name and email address. There are two ways you can configure this. You can specify the report path and document type to save the signed document in document records or keep it basic without configuring these fields. When the Report Path hasn't been configured for a native electronic signature journey task, the View Document link won't be displayed. You can see the date on which the consent was provided. Only the name of the person providing their signature is validated against the logged in user's name. There's no validation for the optional email address field. See the topic, *Configure Native Electronic Signature in Journeys*	User clicks the Done or Complete button.	Sign employment agreement.
Oracle Process Automation	Enables users to automate business processes using the integration with Oracle Process Automation (OPA).	User clicks the Done or Complete button.	Employee asset request, uniform request.

Task Type	What You Use it For	When is Task Complete	Example
	See the topic, *Integrate with Oracle Process Automation in Journeys*		
Questionnaire	Add a questionnaire to collect feedback from workers. You use the questionnaire functionality in HCM to create a questionnaire and select the appropriate subscriber depending on one of these journey categories: • Guided Journey - Guided Journeys • Survey (General) - Journey Surveys • Survey (Touchpoints) - Touchpoints • Other categories - HR Checklists The data collected using a questionnaire is available only within that questionnaire. You can create a custom BI report to fetch that data for display. To view and answer questions in a questionnaire, you need to add the HRT_MANAGE_ QUESTIONNAIRES_PRIV privilege to your custom roles which need to access the questions in the journey task.	User clicks the Done or Complete button.	Onboarding survey, exit questionnaire, collect information.
Report	Specify and include a link to a published BI report. See the topic, *How You Configure the Report Task Type in Journeys*	User is taken to another page to do the task but revisits the task page to mark the task as done or complete.	Report that has all the employee details such as personal and assignment details for employee review.
User Defined Content	Display custom content from external end points in guided journeys. You can define a guided journey task by using this task type and connect a custom REST API. This task type is available for all journey categories except the Survey category. See the topic, *Configure User Defined Content Task Type for a Journey*	User is taken to a panel drawer on the same journey page to do the task.	Global salary analysis for an employee based on their career level matrix.
Video	Add a video using either an Embedded URL or a Media URL for a video.	User clicks the Done or Complete button.	Welcome video from the CEO to address new hires in the organization.

Task Type	What You Use it For	When is Task Complete	Example

	• Embedded URL: Supports videos hosted on media servers that support an embed format.
	• Media URL: Supports videos hosted on media servers that don't support the embedded format. For example, Oracle Universal Content Manager (UCM).
			Example of an Embedded URL on YouTube, `https://www.youtube.com/embed/tsl5Zsbk8VQ`
			
			Example of Media URL and how you build the syntax of the URL:
			
			Link to access UCM:
			`https://<pod URL>/cs`
			
			When adding a media file from UCM, the link is generic. Example:
			`<generic internal URL>/cs/groups/fafusionimportexport/documents/digitalmedia/ytaw/mtu1/~edisp/ucmfa00155968.mp4`
			
			You need to replace the part that says generic internal URL with your actual pod URL.
			
			The media URL for a video hosted in UCM will be something like this:
			`<actual pod URL>/cs/groups/fafusionimportexport/documents/digitalmedia/ytaw/mtu1/~edisp/ucmfa00155968.mp4`

Points to Consider

- You can configure Notifications, Reminders, and Notes for all task types.
- If a document type is configured for the task, the attachments are stored in Document Records.
- If a document type isn't specified, then the attachments are stored in Universal Content Manager and are accessible only from the completed journey task.
- All attachments uploaded for a specific task are stored against the same document record created based on the document type configured for the task.
- For tasks of the type Application, External URL, Learn Community, Learn Enrollment, Report, DocuSign, and I-9 Verification, the Done button is enabled only after the user accesses to the task at least once.
- For tasks of the type Electronic Signature, the Done button is enabled only after the user clicks See Document at least once.

Task Completion Responsibility and Display

This table lists the task behavior when you haven't changed the default setting in the task display properties. You can modify the display properties to change the default task behavior.

Task Type	Who can complete the task?	What does the task non-performer who has access to the assigned journey see?
Advanced Task	User who has access to the assigned journey.	All task details.
Application Task	Task Performer	Such a user can view notes and mark it as not applicable. However, the link to access the application task isn't displayed.
Configurable Form	User who has access to the assigned journey.	All task details.
Document	User who has access to the assigned journey.	All task details.
Electronic Signature - DocuSign	Task Performer	Such a user can view notes and mark it as not applicable. However, the link to access the document to be signed isn't displayed.
Embedded Application Task	User who has access to the assigned journey.	All task details.
Embedded Learn	User who has access to the assigned journey.	All task details.
External URL	User who has access to the assigned journey.	All task details.
I9 Verification	Task Performer	Such a user can view notes and mark it as not applicable. However, the link to access the I9 form isn't displayed.
Learn Community	Task Performer	Such a user can view notes and mark it as not applicable. However, the link to access the learn community isn't displayed.
Learn Enrollment	Task Performer	Such a user can view notes and mark it as not applicable. However, the link to access learn enrollment isn't displayed.
Manual Task	User who has access to the assigned journey.	All task details.
Native Electronic Signature	Task Performer	Such a user can view notes and mark it as not applicable. Additionally, the link to view the document to be signed is displayed.
Oracle Process Automation	Task Performer	Such a user can view notes and mark it as not applicable. However, the link to access the process isn't displayed.
Questionnaire	User who has access to the assigned journey.	All task details.
Report	User who has access to the assigned journey.	All task details.
User Defined Content	User who has access to the assigned journey.	All task details.
Video	User who has access to the assigned journey.	All task details.

Related Topics

- Journey Display Properties

How do I create journey tasks?

Create, maintain, and view tasks used in journey templates using the Checklist Templates task in the Setup and Maintenance work area.

You can create a task directly in a journey that's assigned to a user when the journey is triggered or create tasks in the task library that can be assigned manually by a line manager or HR specialist.

Based on whether you want the task to be available for use in a journey immediately or later you set the status as Active or Inactive.

This table shows the attributes you can configure for a journey task:

Field or Tab	What You Use it For
Sequence	You can specify the sequence in which tasks must be displayed. This is set to Yes by default. You can disable this by modifying the **Order Tasks by Sequence** journey property in the Display Settings tab. Sequence only controls the display of tasks, it doesn't restrict the task performer from performing the tasks in any order. Here's what you need to note if you use Journeys: • If sequence is enabled using display settings, the tasks always remain in the same position, regardless of their status. • If sequence isn't enabled, the tasks are ordered by in-progress tasks ordered by due date, followed by dependent tasks, then deferred tasks, then completed tasks. • When you access a specific journey under My Journeys or Assigned Journeys, the journey tasks are displayed in sequence only in the context of the journey. • The My Tasks tab doesn't show the tasks in the sequence that they are configured in a specific journey. This is because the tab contains tasks from multiple journeys.
Required	Specifies if the task is required or optional.
Target Duration	This determines the target end date of the task. Tasks that cross this duration become overdue tasks and are shown with an **Overdue** badge on the journeys pages. If you configure the task target duration in units other than days, the application will convert the specified duration into days and calculate based on that. It's recommended that you configure a target duration for each task, else the task won't be overdue. Additionally, you can't configure expiry based on the due date without a target duration.
Expire	This determines the date when the task will expire. If a task is not performed within the expiry period, then the task automatically moves to an expired (completion) status after that period and can't be acted upon. The option to specify the expiry is available for both required and optional tasks. You can't set a default value for the task expiry. However, you can use HCM Data Loader to update the task expiry for your existing tasks in the journey template. You can set the task to expire either based on the task assignment date or task due date. For example, if you specify 10 days after task due date, it means the task will expire that many days after the due

<table>
<tr><th>Field or Tab</th><th>What You Use it For</th></tr>
<tr><td></td><td>date. If you want the task to expire based on the due date and you modify the due date for some reason, the task expiry is calculated again.

When a task expires, it's marked as completed. The expired tasks are not deleted.

You can set the expiry duration value between 1 to 365 days so that tasks don't remain open for a very long period. If the value exceeds 365, a validation error is displayed in the Expire field. Field-level validation for task expiry is enforced when you do these actions:
Set up a task using checklist templates.
Create a task using Explore Tab > Create Journey.
Task expiry is not displayed to the end user. Therefore it is recommended to enable reminders before the expiry duration or configure the target duration and expiry to same number of days.

This is what happens when task expiry is configured:
The Process HR Checklist and Tasks ESS process during the daily run evaluates tasks that have the expiry configured and moves the tasks to expired status. When this happens, the date of expiry displays along with Expired status and no further action is possible.
To notify task owners and performers when a task expires you can use the Task Expiration for Owner (ORA_CHK_TASK_EXPIRED_OWNER) and Task Expiration for Performer (ORA_CHK_TASK_EXPIRED_PERFORMER) predefined alert templates or a user-defined template in the Task Alert Templates section.
To receive expiry alerts for a task, you need to navigate to the Notification and Reminders tab. Then, in the Notification Overrides section, select the When task is completed check box for Owner and Performer.
An individual task within a journey expires or times out.
When a task expires, the task status is set to EXP.</td></tr>
<tr><td>Delay Duration</td><td>This delays the start of a task by the number of days configured after which the task is assigned to a task performer. If you configure the task delay duration in units other than days, the application will convert the specified duration into days and calculate based on that.
For more details, refer to the Examples of Task Delay Duration in Journeys topic in this guide.</td></tr>
<tr><td>Preceding Task > Display preceding task</td><td>Select the preceding completed journey task and set the display to Yes. When the task performer reviews their current task in the journey, they can view details of the preceding task by clicking the view option. Here are a few examples:
An employee completes a questionnaire task related to procuring laptop and other accessories. The IT administrator is notified when the employee task is completed. The administrator can view the answers provided by the employee from their task to procure the necessary required equipment.
A line manager completes a feedback questionnaire task for an employee on probation. The employee can view the feedback from their task and acknowledge the same.
Here's a few points to note:
You can view the preceding task information only for these task types and tabs:
Task types: Advanced Task, Configurable Form, Document, Manual Task, Native Electronic Signature, Questionnaire, Report, and Video.
Tabs: My Journeys, Assigned Journeys, Team Journeys, and Organization Journeys.</td></tr>
</table>

Field or Tab	What You Use it For
	• You can't view the preceding task information under the My Tasks tab. • This feature can be configured only on the Redwood Journey Template page. For more information, see this topic: *How do I configure a task to display details of a preceding completed task?*
Task Type	Specify the type of task that should be performed, whether it requires the performer to go to an external website or can be performed in an internal application. For example, the task could require a new hire to enroll for benefits. You can use the available task types in any journey category. All task types have the **Save as Draft** action. If there are mandatory fields in a task (for example, questionnaire or configurable form), you need to enter them all to use the **Save as Draft** action. When a completed task of the type Questionnaire or Configurable Form is reopened, the responses provided by the task performer when completing the task are preserved. The task performer can update the responses and resubmit. For more details, refer to the topic Task Types in Journeys in this guide.
Attachments and Comments	Enable attachments and comments when you create the task. If you enable Attachments, you can configure the document type you want the attachments to be stored against. In case you don't specify a document type, the attachments won't be stored in Document Records. In case you upload multiple attachments, they will be stored against the same document record for the specified document type. Also, a journey assignee or task performer can add attachments and comments when performing the task. By default, attachments are stored for the task performer but you can change that. Based on what you select, journey assignee or task performer, attachments are stored in that person's document records. The attachments you can store are attachments added to an assigned task, BIP reports that are generated as part of the report task type, and signed documents generated as part of the native electronic signature task type. You can enforce adding attachments and comments by setting the display property to Yes for both **Make attachments required** and **Make comments required** on the Display Properties tab of a task. I-9 documents will always be stored against the journey assignee.
Notification and Reminders	You can set task notifications and reminders to draw the attention of task performers to the tasks. You can also specify the frequency for these reminders. You can use predefined alert templates in your journeys to notify task owners and performers for events related to absence, health and safety, learning, person, recruiting, and talent. Task performers and owners access their tasks either from the Recent Notifications Alert or from the My Tasks section in their BPM worklist. Optionally, they can create a user view to filter the tasks in their worklist. For example, task owners may create a user view to only display those tasks that they own and not display tasks for which they're performers.
Notes	Include instructions and details for task performers on how and where to perform the task.

Field or Tab	What You Use it For
	If you want to include images in the Notes section for a journey task, it's recommended that you host the image in an accessible location. Additionally, include the image URL in the Notes section instead of embedding the images. If you embed images directly in the Notes section, your table storage will increase rapidly. You can do these things in the Notes section: • Configure the URL that you specify in Notes section to open in a new window. To do this, you select URL as the link type, and then specify the protocol and URL in the Link Info tab. You then select New Window in the Target tab so that the URL opens in a new window. • Include deep links in task notes to directly open application pages that you need to use. • Hide or change the default Notes header to something more meaningful for the task. If you hide the Notes header, the expand and collapse option is also hidden. This is applicable only for responsive pages and not for Journey pages.
Display Settings	Control access to a task section or action based on role.

Based on the configuration, a task performer can add comments and attachments as listed in this table:

Configuration	Task Performer Action	Result of Action	When to Use
On the journey task setup page, enable **Comments** and **Attachments**. Also, enable **Send attachments to document records**.	Add comments and attachments on the task page.	Only the comments are available in the Completed Tasks section of the assigned journey. Attachments are available only in Document Records.	Recommended if you require the attachments to be available in Document Records after the task is completed.
On the journey task setup page, enable **Comments** and **Attachments**.	Add comments and attachments on the task page.	The comments and attachments are available in the Completed Tasks section of the assigned journey.	Recommended if you don't want the attachments to be available in Document Records.
No configuration.	Add comments and attachments directly in the task notification.	The comments and attachments are available only in the notification through BPM worklist until the time that that notification is purged or archived. They won't be accessible from the journey task.	Not recommended for journey task notification.

In the journey template, you can use the advanced instructions layout for a journey task to add enhanced content, such as videos and images, in addition to the existing rich text format.

This table describes the layout options that you can use in the advanced instructions layout.

Layout Option	Description
2 Columns, 40-60	The notes are spread across 2 columns in the ratio of 40 and 60. The left column uses 40% space in the layout and the right column 60%.
2 Columns, 50-50	The notes are spread across 2 columns in equal ratio of 50 and 50. The left and right columns use equal 50% space in the layout.
2 Columns, 60-40	The notes are spread across 2 columns in the ratio of 60 and 40. The left column uses 60% space in the layout and the right column 40%.
One Column	This is the default layout option having only one column.
One Column, 2 Panels Stacked	The note uses one column where 2 panels are joined together.

Here's some points to note when you use the advanced instructions layout:

- You can't edit the advanced instructions layout for a task by using the **Edit** pencil icon. You need to select the **Advanced instructions layout** value from the **Actions** menu of the corresponding task. If you click the Edit icon, this information message is displayed: Advanced instruction layout is enabled for this task. Manage instructions on that page from the actions menu.
- If you use advanced instructions layout to edit task instructions, you are defaulted to the **One Column** layout option. If you make changes by using another layout option and save, you can't use the Edit icon to modify the task notes.

How do I schedule recurring journeys?

You can schedule a recurring journey for all journey categories except Survey and Enterprise Onboarding when you assign journeys in the Journeys app. For example, as a manager, schedule a recurring monthly check-in with your directs.

You need to set **Enable recurrent scheduling** to Yes on the Message tab of the journey template on the setup page. With that configured, when you assign a journey in the Assign Journeys flow, you can choose these **Repeat** options:

- Never - Indicates the assignment is one-time and won't recur.
- Day - Indicates the assignment is on a daily basis.
- Week - Indicates the assignment is on a weekly basis. For example, every Monday.
- Month - Indicates the assignment is on a monthly basis. For example, say you have set the recurrence to start on 20th September and set the recurrence value to 3, then the journey is assigned on 20th September, 20th October, and 20th November.
- Year - Indicates the assignment is every year.

You can schedule recurring journeys by including the value for the **Repeat Frequency** of the journey and generate periods in the schedule with their start and end dates. Here's 2 examples to illustrate this functionality:

- Schedule a recurring journey while assigning the journey to repeat on the first day of the month every 3 months. For example, to review and update personal information.

- Configure a schedule for a survey journey to repeat every 3 weeks. For example, to check employee wellness.

For more information, refer to this topic: *How do I schedule a recurring journey with a repeat frequency?*

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.

If there are open periods from the previous assignment, you can enable the **Expire previous open periods** to set them to close automatically. Before you assign the journey, make sure you review the details and edit the schedule. Then select the population to whom the journey must be assigned and assign the journey. You can't make any further changes to the schedule from the Journeys UI.

The Allocate Scheduled Journeys process automatically assigns the journey. However, the process has no seeded schedules and the user needs to schedule the process if they want to use it to assign journeys.

After a journey is assigned, only users with access to the Scheduled Allocations tab can deselect assignees or delete the whole schedule for an already assigned journey. There's no way to revisit and update completed periods in the schedule.

You can't assign a scheduled recurring journey by using HCM Data Loader (HDL) or REST API.

How do I use predefined alert templates for journey notifications?

You can use predefined alert templates in your journeys to notify task owners and performers for journeys triggered based on events related to absence, health and safety, learning, person, recruiting, and talent.

You can create a copy of these templates and use them to override the default alert notifications.

- To override the default, in Setup and Maintenance, go to the Manage HCM Alerts task. Select the event alert for which you want to modify the template or add a new template. Click **Add Template** to create a template as per your requirements. You can only create new alert templates for delivered event alerts. You can't create new event alerts.
- You need to associate the custom alert template to the appropriate notification for a journey or task.
    a. All journey level alert templates can be associated at Checklist Templates > Specific Template > Message tab.
    b. All task level alert templates can be associated at Checklist Templates > Specific Task > Notifications and Reminders tab > Notification Template Overrides section.

Here are some points to consider:

- The predefined alert template Checklist Force Closed for Assignee is used for the alert that's sent when you enable **Send notification when checklist is force completed** in the Display Properties tab. You can't override the template for this. However, you can modify the predefined template, if required.
- If the processing mode is set to **Alerts based notification**, and the communication method is set to Worklist, then administrators can view generated alerts at Worklist > Administrative Tasks.

- The FUSION_APPS_HCM_SOA_APPID abstract role is used to initiate HR Journey transactions. Therefore, HR Journey transactions won't be displayed in the Transaction Console when data security is enabled for the Transaction Console. Instead, users can use the BPM Worklist to view HR Journey transactions.
- The Transaction Console displays the **Checklist Action occurrence** and **Employment Checklist Allocated Task Composite** entries only for journeys having the processing mode as **BI Publisher based notification**. However, for journeys having the processing mode as **Alerts based notification**, the Transaction Console won't have an entry.
- If the alerts channel is disabled then alerts aren't sent.

Move Existing BIP Notifications to Alerts Based Notifications

You can change the processing mode when you configure a journey template to use alerts-based notifications. You can do this by going to Checklist Templates > Message tab > Processing Mode. The processing mode options you can select are described in this table.

Processing mode	Description
BI Publisher based notification	This mode ensures SOA composites are used to assign journeys and tasks to workers and notifications are sent using BIP based notifications.
Alerts based notification	This mode ensures ESS mechanism is used to assign journeys and tasks to workers and notifications are sent using alerts.
Null or blank	This mode ensures SOA composites are used to assign journeys and tasks to workers and notifications are sent using BIP based notifications.

You can add seeded tokens to journey event alerts to enhance alert notifications. For more information, refer to this topic: *How do I add seeded tokens for journey event alerts?*

Customize Alert Notifications for Journeys and Tasks

You can configure custom alert notifications from the Notifications tab in the journey or task UI based on the notification type.

For example, you can configure customized notifications in these scenarios:

- When a journey is assigned or force completed.
- When a task is assigned or reassigned.
- When a task is completed or deleted.
- When a task is updated or force closed.
- When a task expires or is marked as not applicable.
- When you need to send task reminders.

By using the content type **User-defined content**, you can provide your custom content for the title and description for the journey template and tasks.

If you configure a User-defined content alert, the alert notification is generated in Redwood style. It's recommended that you use this alert template for modern and improved notifications.

For more information, refer to this topic: *How do I configure alert notifications for default and user-defined content for journeys and tasks?*

Here are some points to consider:

- Existing journey and task notifications will continue to use the **User-defined alert template** if you have configured one.
- If you don't select an alert template, the application will use the **Default content** seeded template by default.
- By default, notifications for new journeys and tasks will use the **Default content** type.
- This feature is only applicable to Redwood Journeys.

For more information on alert templates for journeys, see the document Alert Templates for Event Based Journeys (https://community.oracle.com/customerconnect/discussion/630996) on Customer Connect.

What are contextual journeys?

Using Contextual Journeys you can configure tasks that need to be performed by different task performers before a HCM transaction.

Consider these examples of setting up tasks for contextual journeys:

- Ryan who's a line manager in Vision Corp, Redwood Shores wants to transfer Jodie his direct report to Vision Corp, Santa Clara. Before transferring Jodie, Ryan needs to do certain tasks, such as checking for the availability of position, reviewing Jodie's performance, and updating payroll. You create a contextual journey that is displayed to Ryan when he selects the Transfer quick action from the My Team tab. The contextual journey will guide Ryan to complete the required tasks in the transfer process and transfer Jodie.
- Rohini, an employee in Vision Corp, Pleasanton wants to go on medical leave. Before applying for the absence, she needs to check leave status, define work schedules, and reassign responsibilities. When Rohini selects the Add Absence quick action from the Me tab, the contextual journey will guide her to complete the required tasks before submitting absence details.
- Rahul, a line manager in Vision Corp, India wants to promote Vijay, his direct report. A contextual journey is displayed to Rahul when he selects the Promote quick action from the My Team tab. Rahul starts the contextual journey to help him with the promotion process, complete required tasks, and finally initiate the promote action. Additionally, the initiated contextual journey is displayed under the Assigned Journeys or Team Journeys tab (if Oracle Search is enabled).

Even though you complete all tasks in a contextual journey, the HCM transaction won't start automatically. Therefore, it's recommended that you add an application task for the HCM transaction as the last task in the contextual journey template. Contextual journeys are displayed on the Assigned Journeys, Organization Journeys, and Team Journeys tabs.

This table shows how contextual journeys are displayed on various tabs based on who initiates the contextual journey.

Initiator for Contextual Journey	Displayed on My Journeys Tab	Displayed on Assigned Journeys Tab
Employee (for example, Resignation)	No	No
Line Manager (for example, Transfer)	No	Yes

Initiator for Contextual Journey	Displayed on My Journeys Tab	Displayed on Assigned Journeys Tab
HR Specialist (for example, Promote)	No	Yes

You need to enable contextual journeys using the ORA_PER_CONTEXTUAL_JOURNEYS_ENABLED profile option. When this profile option is enabled and a configured contextual journey is available for a quick action, users see one or more eligible contextual journeys when they initiate a quick action from either Me, My Team, or My Client Groups.

To configure a contextual journey, you use the Contextual Journey category in Checklist Templates. Unlike other journey templates, the attributes to configure contextual journey are different. In addition to basic details, you need to select a context such as Me, My Team, or My Client Groups. You then associate this context to a quick action.

Additionally, you can choose attributes that are available for the action and configure criteria that will determine who will see the contextual journey. For example, if you want the contextual journey and tasks to be specific to worker locations, you can configure the location specific attributes at the template level. When the user initiates the quick action, they will see the contextual journey that has been configured for that worker's location.

You can open a contextual journey by selecting a Redwood-enabled quick action when configuring the journey. For example if you use the Document Records quick action while configuring a contextual journey to add document records, you can open the document records Redwood page from the Journeys UI.

Here are some points to consider:

- The contextual journey is displayed only when you initiate the quick action directly from the Me, My Team, or My Client Groups tabs on the application home page. For example, the contextual journey isn't displayed when you initiate the quick action from the list of actions for a worker in the My Team Overview page or from Deep Links.
- Consider this scenario. An Area of Responsibility (AoR) or line manager of a nonprimary assignment initiates a transaction which has a contextual journey. Additionally, the AoR or line manager starts the contextual journey. In this case, if the task performer or owner is a line manager or AoR, then the journey task is always assigned to the line manager or AoR of the primary assignment of the worker.
- You can't change the category of an existing journey to Contextual Journey. Instead, define a new contextual journey.
- The DocuSign and I-9 task types aren't supported in contextual journeys.
- All your contextual journeys configured for responsive quick actions will now open for supported equivalent Redwood quick actions.
- To know the list of quick actions supported for Contextual Journeys, you need to check the quick action list of values (LoV) on the journey setup page.
- The processing mode for contextual journeys is set to Alerts based notifications by default and BI Publisher notifications aren't supported.
- You can't configure an eligibility profile at the journey or task level for contextual journeys.
- The **Don't copy, use source document** check box is available when you configure a Document task type only in a contextual journey. If you enable this setting, a copy of the document isn't created at the time of task assignment thereby improving performance.
- Contextual journeys don't support all the journey display properties. For example, you can't hide the Contact Us section for a contextual journey.
- Contextual journeys aren't supported for future dated hires. If you configure a contextual journey for a quick action and select a future dated worker, you need to click the **Continue without journey** button.

- Contextual journeys aren't displayed on the My Journeys tab. They will be displayed on the Team Journeys and Organization Journeys tabs when you enable Oracle Search.

What are personal journeys?

In contrast to predefined journeys that are available to all users, your personal journey templates are private and only available to you. You can manage your personal journey templates from the Explore tab in the Journeys app.

Personal journeys are also displayed on the My Journeys and Assigned Journeys tabs based on the access level of users.

For example, an employee starts a career development journey which is private. Only the employee can see the journey on the My Journeys tab and it's not visible to others.

This table shows how global and personal journeys are displayed on the My Journeys and Assigned Journeys tabs based on the access level configuration.

Access Level Configuration	Displayed on My Journeys Tab	Displayed on Assigned Journeys Tab
Global journey template – Assignee Only	Yes	No
Global journey template – User with Assignee or Journey Template Access	Yes	Yes
Personal journey template – Assignee Only	Yes	No
Personal journey template – User with Assignee or Journey Template Access	Yes	Yes

You can create a personal journey template in any of these scenarios:

- When you select an existing global journey template and modify it
- When you select an existing personal journey template and modify it
- When you create a new journey template altogether

Here's how you can act on a personal journey template:

- View the journey
- Assign the journey to others
- Add it to your journeys
- Edit the journey
- Delete the journey

Personal journey templates won't be available from the responsive Allocate Checklists page.

When you create a personal development 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 template 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).

What are the attributes that define a journey template?

This table shows the attributes you can configure for a journey template:

Field, Section, or Tab	What You Use it For
Date From - Date To	Defines the period during which this template is valid and can be assigned to workers.
Country	For information purpose only and doesn't filter journeys based on the country. If you want to restrict journeys based on country, then use eligibility profiles.
Eligibility Profile	Link an eligibility profile to determine for whom the template is applicable. The journey template is assigned only if it matches specific eligibility criteria, such as person type, business unit, legal employer, and so on. The criteria that you configure in an eligibility profile is evaluated when a journey or task is assigned to a worker. The journey or task is only assigned to those workers who satisfy the eligibility profile criteria. Create the eligibility profile with Checklist as the value for Profile Usage. The value you select in Assignments to Use can only be one of these options: • Any assignment - enterprise • Any assignment exclude inactive - enterprise • Employee assignment only - enterprise • Primary Employee assignment only - enterprise Let's say you need to assign a journey to all employees, except employees in the US. In such a case, you need to configure the eligibility profile by using the Assignment to Use as Specific Assignment option to evaluate eligibility. This option means that assignment data from a specific assignment will be used for eligibility criteria evaluation. For example, location of the assignment will be used in evaluating the eligibility criteria. Once the eligibility criteria is evaluated, the journey is automatically assigned to the primary assignment of the worker. The Line Manager and AOR are also evaluated for the primary assignment and notifications are sent accordingly to them. A journey is assigned to a specific assignment only if the journey assignment is manual from the UI, HDL, or REST. Automated journey assignments will always be done to the primary assignment of the worker. You can enter eligibility criteria only in the Person, Employment, and Labor Relations tabs as they contain attributes which are applicable for the journey. Additionally, you can create a fast formula. Here are a few points to consider when configuring an eligibility profile: • Journeys can't be assigned based on an eligibility profile criteria. • When you associate eligibility profiles to a journey or task and there are multiple journeys to be evaluated, there is no particular order in which the journey is evaluated for eligibility. The first journey that meets the criteria is assigned to the worker.

<table>
<tr><th>Field, Section, or Tab</th><th>What You Use it For</th></tr>
<tr><td></td><td>
When a journey is manually assigned, it doesn't evaluate the eligibility profile associated to the journey and assigns that journey even to ineligible workers. This is because the parameters related to automatic assignment, such as Actions, Action Reasons, Events, Eligibility Profile, Allocation Criteria, Days for Initiation, and so on aren't evaluated.
Eligibility profiles are evaluated during manual journey assignment only for journey tasks and the enterprise onboarding step journey. They are not evaluated for the enterprise onboarding master journey and all other journey categories.
Journey templates are displayed in the Explore tab even if eligibility profiles are configured for the templates. However, you can control which templates should appear in the Explore tab by configuring template-level security.
If you try to assign a journey having eligibility profile at the journey level by using REST API, this error message is displayed for the assignment:
<pre>result: An error occurred during checklist allocation. Try again later. (PER-1532327).</pre>
Journeys that you want to assign by using REST API must not have an eligibility profile attached at the journey level. However, associating eligibility profile at the task level will continue to work.
You can configure appropriate eligibility profiles to prevent a journey or journey task from being assigned to a worker in either of these scenarios:
The worker is hired on a date that's after n number of days in the past.
The worker is terminated on a date that's after n number of days in the past.
</td></tr>
<tr><td>Category</td><td>Select the category based on the template usage. The values for a category are configured in the CHECKLIST_CATEGORY extensible lookup by using the Checklist Lookups task. Journey categories that are delivered by Oracle can't be modified. However, you can add additional categories to the CHECKLIST_CATEGORY. Once the template is saved, the category can't be modified.
The CHECKLIST_CATEGORY lookup type is now obsolete and not in use.</td></tr>
<tr><td>Configure actions and action reasons</td><td rowspan="3">Specify an action or configure an event based on which the journey needs to be automatically assigned.</td></tr>
<tr><td>Configure person events</td></tr>
<tr><td>Configure events</td></tr>
<tr><td>Access Level</td><td>Configure the journey access level when you create or edit a journey template and define the visibility of the journey template.
Global journey template: Configure the access level from the Journey Setup page.
Personal journey template: Configure it directly in the Journeys app.
These are the access level options:
Assignee Only (Private Journey)
The employee can self-assign and start the journey.
The journey is only visible to the employee who self-assigned it.
No other user, including managers or HR specialists, can access it.
This is the current default behavior for self-assigned private journeys.
Note that the configured display properties don't apply for a self-assigned private journey.</td></tr>
</table>

Field, Section, or Tab	What You Use it For
	• User with Assignee or Journey Template Access (Public Journey) ◦ The employee can self-assign and start the journey. ◦ The journey can be accessed by the assignee and others with appropriate person or journey template security (for example, line managers or HR specialists) Note that the configured display properties are applied for a self-assigned public journey. You need to set the ORA_PER_JRN_ENABLE_ACCESS_LEVEL profile option to Y to enable the Access Level property for assigned journeys. For more information, refer to these topics: • *How do I enable a profile option?* • *How do I configure the access level property for a journey template?*
Archive after how many months? Purge after how many months?	Specify the duration after which journeys that are assigned based on the template will be archived and purged.
Allocation Criteria	Select a criteria to determine when the journey will be assigned.
Completion Criteria	Select a criteria to determine when the journey will be marked complete.
Template Title	You can configure a title that's displayed at the banner header level when a user accesses a specific journey. Attributes, such as {FirstName}, {LastName}, {FullName}, and {DisplayName} are supported. If the Template Title isn't configured, the template name is displayed as the title in the assigned journey page.
Processing Mode	By default, this is Alerts based notification. You can modify it to BI Publisher based notification.
Alert Templates	You can configure the alert templates that need to be used when the journey is assigned or force completed, including the combined notification template.
Enable recurrent scheduling	If you want to specify recurrence for a journey in the Journeys app, you first need to set the value to Yes. Based on the frequency specified in journeys, a summary of the periods in the schedule is auto-generated and listed in Period Summary in the Scheduled Allocations tab. The periods are enabled by default and can't be edited. However, HR specialists can deselect assignees or delete the whole schedule of an already assigned journey. The Allocate Scheduled Journeys ESS process, which runs daily, 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 journeys.
Background image	When creating a journey template, you can upload an image file or specify an image URL to visually represent the journey. Uploaded image files must not exceed 5 MB in size. The selected image appears in the header section of the journey page when users access a specific journey through the My Journeys or Explore tab. Note that the Redwood Journey Templates setup page only supports image file uploads. Image URLs aren't supported on this interface because uploaded files allow for resizing, previewing, and alignment with design requirements. Templates previously configured with image URLs will continue to function. However, to update or replace the image in such templates, an image file must be uploaded during the editing process on the Redwood Journey Templates setup page.

Field, Section, or Tab	What You Use it For
	These must be the image specifications: • XL (1440+ px) • L (1439 px – 1024 px) • M (1023 px - 600 px) • S (599 px - 320 px)
Note board	Include additional content, such as note board for all categories of journey templates. There is no provision to create additional sections. The Note board section is limited to 3 sections each. The Note board section doesn't support images. It's only for text and links.
Events and happenings	Include additional content, such as events and happenings for all categories of journey templates. The same image is visible under the Events and happenings section, as it's a seeded image that can't be modified. If you don't provide any image, it will use and display the seeded image. If you want to have a specific image, you need to provide the image in the Image URL field on the configuration page of the dashboard. Ensure that the image dimension is 280x200 pixels or larger to avoid distortion.
Get in touch	View information about the Line Manager and Areas of Responsibility of the journey assignee, such as their name and email address.
Display Settings	Control access to a journey section or task action based on role.
Security	Configure access to templates and assigned journeys.
Relationships	Associate skills and qualifications with journey templates when you configure career development journeys. This tab is displayed only for journey templates of category Career Development. Currently, only Grow is available as the relationship usage value. The configuration isn't specific to any person, hence it's recommended that you only fill the mandatory attributes for each of the content items that you add. If you associate skills and qualifications with the career development journey template and enable the **Write to person profile on completion** option on this tab, the person can view the journey outcome in their talent profile after they complete the assigned career development journey. The configuration option is available only on the Redwood Journeys setup pages. The journey outcome is updated in the person's profile when the assigned journey has been completed by the person. The journey must be completed according to the journey completion criteria, for example, all required tasks need to be completed. The talent profile is updated only for the person to whom the journey is assigned and has completed it. Other actors in the journey don't receive the journey outcome in their talent profiles. The talent profiles for other actors in the journey isn't updated.

Field, Section, or Tab	What You Use it For
	Note that it's recommended to hide the **Date Achieved** field for the content sections for which you have enabled the **Write to person profile on completion** option on this tab. To do this, follow these steps: 1. Click the **My Client Groups** tab on the application home page. 2. Click the **Profiles** app and then click the **Profile Types** task. 3. Click the **Edit** icon for the **Person** profile type. 4. In the list under the **Content Sections** area, search and click the **Edit** icon in the **Skill Center Section** row. 5. In the **Content Section Subscribers** section, click to clear the **Sync to Content Section Display Property** check box for the **Journey Outcomes** subscriber. 6. Click the **Configure** icon in the **Actions** column for **Journey Outcomes**. 7. In the **Configure content section display types** section, click the **Edit** icon under the **Action** column for the **Date Achieved** label. 8. Select **Hide** in the **Display** field. 9. Click **Apply** 3 times. 10. Click **Update** 2 times.
Schedule Allocation	Schedule survey journeys.

What are guided journeys?

You can 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.

Additionally, guided journeys are also supported in Supply Change Management (SCM) Redwood flows.

You can now configure guided journeys directly by using the new **Guided Journey** quick action in the Journeys Setup area under the My Client Groups tab. You can create a new guided journey or import an existing guided journey. To use this quick action, you need to enable the ORA_PER_GUIDED_JOURNEYS_SETUP_REDWOOD_ENABLED profile option.

You can enable guided journeys for Responsive and Redwood pages. However, there are differences in the way a guided journey is associated with responsive and redwood pages. The rendering of a guided journey is also different on the two pages. This table shows the differences.

Guided Journey Criteria	Responsive Page	Redwood Page	Redwood Compact Guided Process Page
Association	Using Transaction Design Studio (TDS)	Using guided journey page property in Visual Builder (VB) Studio	Using guided journey page property in VB Studio
Page level rendering	**Guide Me** button displayed at the page header level.	Displayed in a banner at the page level. The task opens in a panel drawer when clicked.	Displayed as the first step in the guided process. The task opens in a panel drawer when clicked.

Guided Journey Criteria	Responsive Page	Redwood Page	Redwood Compact Guided Process Page
Section level rendering	**Guide Me** button displayed at the section header level.	Displayed as a link at the section level. The task opens in a panel drawer when clicked.	Displayed as a link at the section level. The task opens in a panel drawer when clicked.

Based on the way you setup the guided journey, when employees, line managers, or HR specialists initiate an action they see a **Guide Me** button. This button appears in ADF and Redwood pages at the section header level, page header level, or both. It lists tasks that you add to guide the user in their transaction.

There are several aspects involved in creating a guided journey.

- First, you need to enable guided journeys using the ORA_PER_GUIDED_JOURNEYS_ENABLED profile option. To do this, use the Manage Administrator Profile Values task in the Setup and Maintenance work area and change the profile value to Y.
- You use the Guided Journey category in Checklist Templates to setup and add tasks that are relevant for the guided journey. You can only use tasks of the type Analytics, Document, Embedded Learning, External URL, Manual Task, Questionnaire, Report, and Video in a guided journey.
- Once the guided journey setup is done, you use the Transaction Design Studio (TDS) to associate it to an action using TDS rules. You use specific attributes available for a TDS action to further determine for whom the guided should display.
- You're done after you select and add tasks that you want to display at the page header or section header region.

You can directly pass parameter token values for a path in a journey task from the preview page of guided journeys. For example, you can pass the token for an OTBI Analysis task to see how the analysis will work when you embed the guided journey in your product page.

For more information using an example, refer to this topic: *How do I configure additional context to preview guided journeys?*

Here are some points to consider:

- Guided journeys are supported on Redwood pages.
- Guided journeys display in various responsive pages configured in TDS to help complete the transaction. You can't assign a guided journey to a worker, so guided journeys don't appear on the My Journeys or Assigned Journeys tabs in the Journeys app.
- You can't change the category of an existing journey to Guided Journey. Instead, define a new guided journey.
- It's recommended to use only one guided journey per TDS action.
- Only a limited set of TDS actions are currently available for configuring guided journeys.
- You can use **Set Modal Window Properties** during setup to specify the size of the modal window that opens up in the guided journey. Here are the properties you need to specify (applicable for mobile view as well):
  - width - The width of the modal window in pixels. The default is 500.
  - height - The height of the modal window in pixels. The default is 350.
  - modal - The type of window. Attributes are Y or N. Y indicates modal window and N indicates non-modal window.

    - resize - The option to resize. Attributes are Y or N. Y indicates users can resize the window.

  For example, width=400;height=300;modal=Y;resize=Y
  You can set up modal window properties for guided journeys only on responsive pages.
- Except the Questionnaire task type, all other task types used in guided journeys are read-only type tasks which don't save any data anywhere.
- It isn't possible to see the responses provided by the user as part of a guided journey questionnaire task anywhere. The responses are stored in the PER_CHK_GUIDED_RESPONSES questionnaire tables. You can build your own OTBI reports to extract this data.
- When you configure security for guided journeys, it only determines who can manage the journey template.
- Guided journeys will be displayed to users who have access to the transaction page for which it's configured.
- From release 24D, if the application identifies that users haven't uploaded a custom background image for the guided journey, then new styles are applied to reduce the height of the guided journey banner. If users want to retain the tall guided journey banner with multi-line primary text, then they need to upload a custom background image for their guided journey.
- The additional context option in the preview page of guided journeys is supported for these task types: Analytics - OTBI Analysis, External URL, Report, and User Defined Content
- You can pass only one value for a parameter when you use the additional context option.

For more information on guided journeys, see these resources:

- Contextual and Guided Journeys (https://community.oracle.com/customerconnect/discussion/631002) on Customer Connect.
- Technical Brief - Enable Guided Journeys for Redwood Pages (https://community.oracle.com/customerconnect/discussion/737656) on Customer Connect.
- Use Transaction Design Studio to Configure Field Displays in this guide.
- Transaction Design Studio -What It Is and How It Works (Document ID 2504404.1) on My Oracle Support.

How do I enable guided journey tasks in an assigned journey task?

In this example, you're associating guided journey tasks that will display to Rina who is a new hire in Vision Corp, India when she's performing onboarding tasks.

The guided journey tasks are intended to provide guidance to Rina for the various tasks in the onboarding process.

1. Go to My Client Groups and click **Show More** under Quick Actions.
2. In the Journeys Setup area, click **Journey Templates**.
3. Click the onboarding journey name for whose task you want to associate guided journey tasks.
4. In the Overview tab, Tasks section, click the **Edit** icon for the task where you want to associate guided journey tasks.
5. Click the **Advanced** tab.
6. 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.

7. Select the guided journey tasks that you want one task at a time.
8. Click **Save**.

When Rina starts the onboarding journey assigned to her, she can access the guided journey tasks at the section level within the nonguided journey task.

How do I define an External URL task type for a guided journey?

1. Go to **My Client Groups > Journeys Setup > Guided Journey**.
2. Click **Create**, and enter the required details such as the journey name and code.
3. Under the Tasks section, click **Add**, select the task type as **External URL**, and provide a URL that includes relevant parameters:
   - https://host?name={value} where name is customer URL based and value can be the relevant parameter.
   - https://host?ActionDate={Action Date}&ActionCode={Action Code}&PersonId={Person ID}&AssignmentId={Assignment ID}&ReasonCode={Action Reason Code}&JobId={Job ID}&LegalEntityId={Legal Entity ID}&BusinessUnitId={Business Unit ID}&PositionId={Position ID}
4. Navigate to the Redwood Employment Info page.
5. From the Settings and Actions menu, click **Edit Page in Visual Builder Studio**.
6. Enable the guided journey in the When and Why section and the Assignment section using the journey code and the External URL task code you defined earlier.
7. Modify the field values in these sections and verify that the URL reflects the correct context-sensitive values.

How do I configure the advanced instructions layout for journey task notes?

1. Go to **My Client Groups > Journey Templates**.
2. Click the journey template name where you want to configure the advanced instructions layout for a task.
3. In the Overview tab, Tasks section, click **Advanced instructions layout** from the Actions menu for the task.
4. Select the layout option.
5. Click **Add** to add text, image, or video based on the selected layout.
6. Click **Save** two times.

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

This table show's you how.

Tab	Set Page Property
Explore	• Set Guided Journeys Code at the page level. • Set Guided Journeys Task Codes at the page level. • Set Guided Journeys Code at the Section Level. • Set Guided Journeys Task Codes at the Section Level. • Set Guided Journeys Code at the page level for Create Journey panel drawer. • Set Guided Journeys Task Codes at the page level for Create Journey panel drawer. • Set Guided Journeys Code at the Section Level for Create Journey panel drawer. • Set Guided Journeys Task Codes at the Section Level for Create Journey panel drawer.
My Journeys	• Set Guided Journeys Code at the page level. • Set Guided Journeys Task Codes at the page level. Specific journey under My Journeys: ◦ Set Guided Journeys Code at the page level. ◦ Set Guided Journeys Task Codes at the page level. ◦ Set Guided Journeys Code at the Section Level. ◦ Set Guided Journeys Task Codes at the Section Level. ◦ Set Guided Journeys Code at the page level for Task panel drawer. ◦ Set Guided Journeys Task Codes at the page level for Task panel drawer. ◦ Set Guided Journeys Code at the Section Level for Task panel drawer. ◦ Set Guided Journeys Task Codes at the Section Level for Task panel drawer.
My Tasks	• Set Guided Journeys Code at the page level. • Set Guided Journeys Task Codes at the page level.
Organization Journeys	• Set Guided Journeys Code at the page level. • Set Guided Journeys Task Codes at the page level. Specific journey under Organization Journeys: ◦ Set Guided Journeys Code at the page level. ◦ Set Guided Journeys Task Codes at the page level. ◦ Set Guided Journeys Code at the Section Level. ◦ Set Guided Journeys Task Codes at the Section Level.
Team Journeys	• Set Guided Journeys Code at the page level.

Tab	Set Page Property
	• Set Guided Journeys Task Codes at the page level. Specific journey under Team Journeys: ◦ Set Guided Journeys Code at the page level. ◦ Set Guided Journeys Task Codes at the page level. ◦ Set Guided Journeys Code at the Section Level. ◦ Set Guided Journeys Task Codes at the Section Level.
Activity	• Set Guided Journeys Code at the page level. • Set Guided Journeys Task Codes at the page level.

How do I set up the visualization configuration for an Analytics task in journeys?

Follow these steps to create the visualization configuration and associate it with the Analytics task:

1. Create the visualization configuration that you want to add to the analytics task. For more information, see this topic: *How do I use the Data Visualization Configuration tool?*
2. Associate the visualization configuration that you created with the Analytics 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 **Guided Journey** quick action in the Journeys Setup area.
   d. Create a guided journey or click the guided journey name in the list where you want to create the Analytics task.
   e. In the Tasks section, click **Add**.
   f. Enter the task name and other details.
   g. Select **Analytics** for the task type and **Visualization Configuration** for the analytics type.
   h. Enter the visualization path as **path=<visualization configuration name>** where **<visualization configuration name>** is the name of the visualization configuration that you created in step 1. For example, enter **path=CDRM_8015**. You can also enter parameters, for example, **path=CDRM_8015&"Worker"."PersonId"={PersonId}**
   i. Click **Save**.

After you finish the steps, users can view the Oracle Transactional Business Intelligence (OTBI) analysis with supported parameters directly in a journey task by using the Redwood theme.

How do I configure the background image for a guided journey task?

Follow these steps:

1. On the home page, click the **My Client Groups** tab.
2. Click **Show More** under Quick Actions.
3. Click the **Journeys Setup** quick action in the Journeys Setup area.
4. Click the **Guided Journey** card.
5. Click the guided journey name where you want to configure the background image for the task.
6. In the Overview tab, Tasks section, click the **Edit Task** icon for the task where you want to configure the background image.
7. Click the **Advanced** tab and click **Add** in the Background image section.
8. Click **Upload Background Image**, search and select the image, and click **Open**.
9. Resize or format the image as required and click **Preview**.
10. Click **Save**.
11. In the **Rename action labels** section, enter your customized action label for the background image or retain the **Show More** default label.
12. Click **Save**.

After you configure the background image for a guided journey task, and the guided journey containing this task is associated with a Redwood page, the user can view the configured background image when they access the guided journey task.

Where and when do I use the Gen AI options for journey task notes?

This table shows the page and the action where the Generative Artificial Intelligence (Gen AI) functionality is available:

Page or Tab	Action
Journey Templates	Add a new task or edit an existing task.
Task Library	Add a new task or edit an existing task.
Task Groups	Add a new task or edit an existing task.
Explore	Add new task, add new task from task library, or edit an existing task.
Assigned Journey	Edit an existing task or add a new task.
Advanced Instructions	Edit an existing task layout or add a new task layout.

This table specifies the criteria used to generate instructions for a journey task:

Criteria	Details
Tone	• Engaging (default) • Formal
Summarize	Instructions generated are 1000 characters in length.
Expand	This is the default setting. Instructions generated are 4000 characters.
Rewrite	When you select this option, instructions are generated based on the character length of the earlier selected option and tone.