Oracle Fusion Cloud Human Resources

How do I mass assign journeys?

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Author: Santosh Radhakrishnan

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1 Mass Assign Journeys

Introduction

You can assign a journey to a person, all direct reports of a person, or the entire organization of a person.

You can assign the journey to one of these assignee types:

- Person (default option): Here you select a single person.

- Directs: You select a single person and the journey is assigned to the direct reports of the selected person.

- Organization: You select a single person and the journey is assigned to the selected person's organization, which includes the entire management hierarchy.

You can make any of these person-based selections:

- Single person.

- Multiple people you select individually.

- Multiple people you select as part of the selected person's direct reports.

- Multiple people you select as part of the selected person's organization.

- Combination of all the scenarios using the **Add Assignee** button.

You can select multiple persons from the user interface only by using one of the multiple selections mentioned above.

Let's see an example of how the journey is assigned when you select different assignee types. This table shows the population for whom the journey is assigned in each case.

Assignee Type	Selected Person	Population for whom Journey is Assigned
Person	Bala Gupta	Journey is only assigned to Bala.
Directs	Bala Gupta	Bala has 14 direct reports. In this case, the journey is assigned to all 14 direct reports of Bala.
Organization	Bala Gupta	Bala's organization has 4686 people that includes the entire management hierarchy. In this case, the journey is assigned to all 4686 people in the organization.

For more information, see this topic: *What happens if you select multiple workers when assigning a journey?*

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Mass Assign by Selecting People Individually

You can assign the same journey to different people by selecting each person individually in the Assign Journey page. Here's how you do it:

1. Go to My **Client Groups > Journeys**.
2. Click the **Explore** tab, select the journey, and then click **Assign**.
3. Enter the date to assign and comments.
4. Ensure that the **Person** value is selected for the assignee selection type.
5. Select a person by entering their name.
6. Add multiple people individually by clicking **Add Assignee** and repeating step 5.
7. Click **Assign**.

Mass Assign to Directs of Selected Person

You can assign the journey to multiple direct reports of a person by selecting the person in the Assign Journey page. Directs include all workers who have a direct reporting relationship of type Line Manager with the selected person.

Here's how you do it:

1. Go to My **Client Groups > Journeys**.
2. Click the **Explore** tab, select the journey, and then click **Assign**.
3. Enter the date to assign and comments.
4. Select the **Directs** value for the assignee selection type.
5. Select the person types for whom you want to assign the journey.

   The Employee and Contingent Worker person types are selected by default. Remove them if you don't want to assign the journey to these person types.
6. Select a person by entering their name.
7. Add multiple directs of another person by clicking **Add Assignee** and repeating steps 5 through 6.
8. Click **Assign**.

Mass Assign to Organization of Selected Person

You can assign the journey to the entire organization of a person by selecting the person in the Assign Journey page. Organization includes all workers who have direct or indirect reporting relationship of type Line Manager with the selected person.

Here's how you do it:

1. Go to My **Client Groups > Journeys**.
2. Click the **Explore** tab, select the journey, and then click **Assign**.
3. Enter the date to assign and comments.
4. Select the **Organization** value for the assignee selection type.

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5. Select the person types for whom you want to assign the journey.

   The Employee and Contingent Worker person types are selected by default. Remove them if you don't want to assign the journey to these person types.

6. Select a person by entering their name.

7. Add the organization of another person by clicking **Add Assignee** and repeating steps 5 through 6.

8. Click **Assign**.

Mass Assign Using Filtered List

You can mass assign journeys for a selected population or assign the journey to multiple people by using a filtered list that can be configured by using various criteria.

A filtered list is a custom list where you can define a list of persons that match the criteria.

For more information about creating a filtered list, see these topics:

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

- *How do I create a filtered list to assign journeys?*

Here's how you mass assign the journey by using a filtered list:

1. Go to **My Client Groups > Journeys**.
2. Click the **Explore** tab, select the journey, and then click **Assign**.
3. Enter the date to assign and comments.
4. Select the **List of Persons** value for the assignee selection type.
5. Select the filtered list from the person list.
6. Add another filtered list by clicking **Add Assignee** and repeat step 5.
7. Click **Assign**.

Mass Assign Using Custom Report, HDL, and ESS

You can assign the journey for a selected population by using this combination:

- Use a custom BI report to identify your population.

- Load the population to a staging table by using HCM Data Loader (HDL). For more information, see this topic section: *Mass Allocate Checklist and Generate Notification*

- Run the **Allocate Scheduled Journeys or Mass Assign Journeys** process to allocate the journey and trigger notifications.

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Mass Assign Using HDL

You can assign the journey for a selected population by loading the population to a staging table using HCM Data Loader (HDL). For more information, see this topic section: *Allocating Only Checklist Template*

Considerations After Mass Assigning Journeys

This table shows the considerations based on the method used to mass assign the journey.

Method	Considerations
Filtered list	• 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.
Journeys UI	• 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.
HCM Data Loader	• Notifications aren't triggered when a journey is assigned using HCM Data Loader (HDL). You can explore a custom report to send out a generic notification or email for journey task assignees to review their tasks. • 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.