

Oracle Fusion Cloud Human Resources

How do I set up an onboarding journey?



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1 Onboarding Journey Setup

Scenario

As an HR Specialist, Alister Cook must create and assign a new hire journey to David Steward.

David has joined Big Computers as a sales executive in the company's Sales Department located in Nevada, US on 5th December 2024. He needs to go through the regular onboarding tasks as prescribed by the company's HR policy.

Let's look at the steps Alister must go through and what David must do to complete the journey.

David must complete these tasks on his first day.

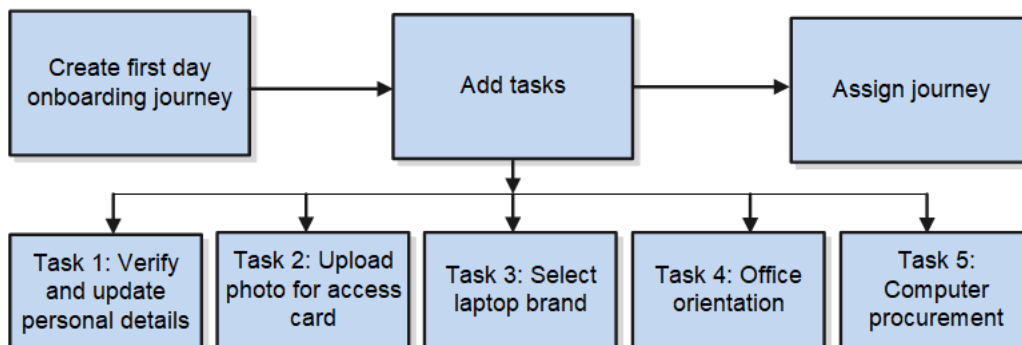
1. Confirm that his personal details are correct and update the record if required.
2. Upload his professional photo, which will be used for the access card.
3. Select the laptop brand and configuration that he's interested in to receive from the organization.

These are onboarding tasks that Alister needs to do for David:

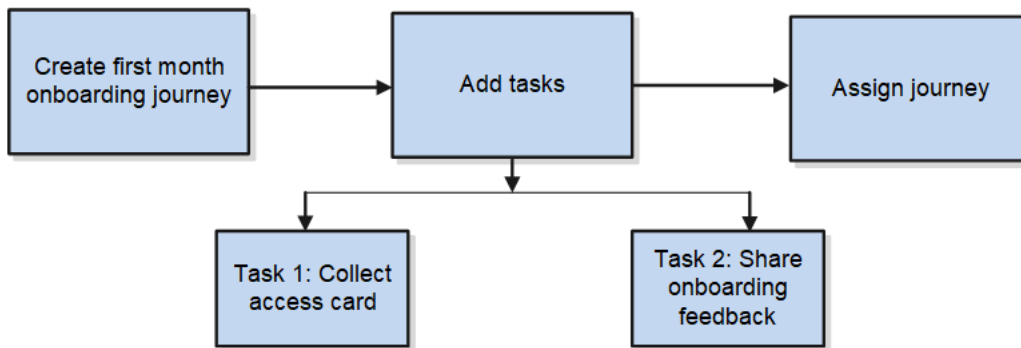
1. Give David a tour of the office premises.
2. Procure computer equipment according to David's configuration choice.

These diagrams show the various steps involved when you create an onboarding journey with tasks that performers need to complete on the first day and after the first month.

New Hire First Day Journey



New Hire First Month Journey



Set Up an Onboarding Journey

This topic describes with an example how to configure two onboarding journeys with onboarding tasks that new hires need to complete on their first day and after the first month of employment.

Create First Day Journey

1. On the **My Client Groups** tab, click the **Journeys Setup** app.
2. In the Journeys Setup page, click the **Journey Templates** card.
3. In the Journey Templates page, click **Create**.
4. In the New Journey window, select or enter these values as applicable.

Field	Value
Creation Method	New
Category	On Boarding
Name	BC First Day Activities
Archive after how many months?	12
Purge after how many months?	12

5. Click **Create Draft**.

Add Tasks to First Day Journey

Add the journey tasks that David must complete by creating each task separately.

1. In the Overview tab, under the **Tasks** section, click **Add > New Task**.
2. In the New Task window, under the **Overview** tab, select or enter these values as applicable for each task. For other fields, enter suitable values or use default values.

Field	Values for Task: Verify and update personal details	Values for Task: Upload photo for access card	Values for Task: Select laptop brand
Task Name	Verify and update personal details	Upload photo for access card	Select laptop brand
Status	Active	Active	Active
Sequence	1	2	3
Make this task mandatory	Yes	Yes	No
Performer	Worker	Worker	Worker
Owner	Initiator	Initiator	Initiator
Task Type	Application Task	Application Task	Manual Task
Application Task	Personal Details	Change Photo	Not applicable
When does the task expire?	After assigned date	After assigned date	After assigned date
After how many days?	30	30	30
Enable comments	No	No	Yes

3. Click **Save**.

Add the manual journey tasks that David's HR Specialist must complete by creating each task separately.

1. In the New Task window, under the **Overview** tab, select or enter these values as applicable for each task. For other fields, enter suitable values or use default values.

Field	Values for Task: Office orientation	Values for Task: Computer procurement
Task Name	Office orientation	Computer procurement
Status	Active	Active
Sequence	4	5
Make this task mandatory	Yes	Yes
Performer	Area of Responsibility	Area of Responsibility
Performer Responsibility Type	HR Specialist	HR Specialist
Owner	Initiator	Initiator
Task Type	Manual Task	Manual Task
When does the task expire?	After assigned date	After assigned date

Field	Values for Task: Office orientation	Values for Task: Computer procurement
After how many days?	30	30

2. Click **Save**.

Once this journey is created, let's create a second journey for the first month's activities.

Create First Month Journey

1. On the **My Client Groups** tab, click the **Journeys Setup** app.
2. In the Journeys Setup page, click the **Journey Templates** card.
3. In the Journey Templates page, click **Create**.
4. In the New Journey window, select or enter these values as applicable.

Field	Value
Creation Method	New
Category	On Boarding
Name	BC First Month Activities
Archive after how many months?	12
Purge after how many months?	12

5. Click **Create Draft**.

Add Tasks to First Month Journey

Add the journey tasks that David must complete by creating each task separately. You need to create the questionnaire by using the Questionnaires application before you create this questionnaire task.

1. In the **Overview** tab, under the **Tasks** section, click **Add > New Task**.
2. In the New Task window, under the **Overview** tab, select or enter these values as applicable for each task. For other fields, enter suitable values or use default values.

Field	Values for Task: Collect access card	Values for Task: Share onboarding feedback
Task Name	Collect access card	Share onboarding feedback
Status	Active	Active
Sequence	1	2
Make this task mandatory	Yes	Yes
Performer	Worker	Worker

Field	Values for Task: Collect access card	Values for Task: Share onboarding feedback
Owner	Initiator	Initiator
Task Type	Manual Task	Questionnaire
Questionnaire	Not applicable	Onboarding Survey
When does the task expire?	After assigned date	After assigned date
After how many days?	30	30

3. Click **Save**.

Assign Journey

You can assign a journey and its tasks either automatically or manually.

For example, you can assign a journey automatically to new hires when you use the employment action to hire an employee. Alternatively, you can assign the journey manually to single or multiple assignees from the Journeys page.

After you create the first day and month journeys, assign them to David. Once the journey is assigned, the journey tasks will be assigned to task performers.

Here's the steps to manually assign the first day journey:

1. On the **My Client Groups** tab, click the **Journeys** app.
2. Click the **Explore** tab.
3. Click the **BC First Day Activities** journey.
4. Click **Assign**.
5. Select or enter these values as applicable. For other fields, enter suitable values or use default values.

Field	Value
When to assign?	Today's date
Assignee Selection Type	Person
Select a Person	David Steward

6. Click **Assign**.

Note: Repeat steps 1 to 5 for the BC First Month Activities journey. However, in step 5, select the assign date exactly one month from today's date.

