2024

Journeys Admin Guide

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V1

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Guide Usage and Disclosures

Guide Information

This guide is designed based on the Oracle Cloud HCM delivered setups; some fields may differ from your instance configurations. For example, some fields may be required in this guide that are not required in your instance. Additionally, some of the training topics discussed in this guide may not apply to your organization, but we know you'll find it helpful. If you would like a custom guide for your organization, please contact Megan Ketter at mketter@camptratech.com.

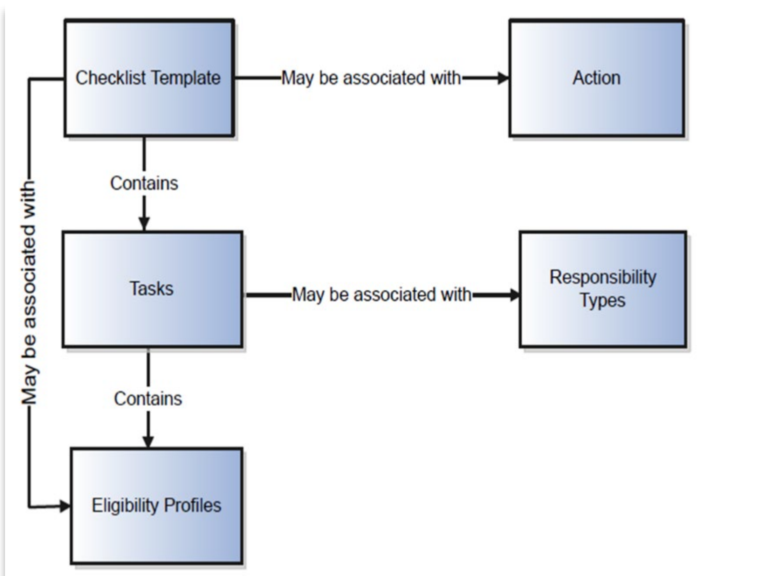
How To Use This Guide

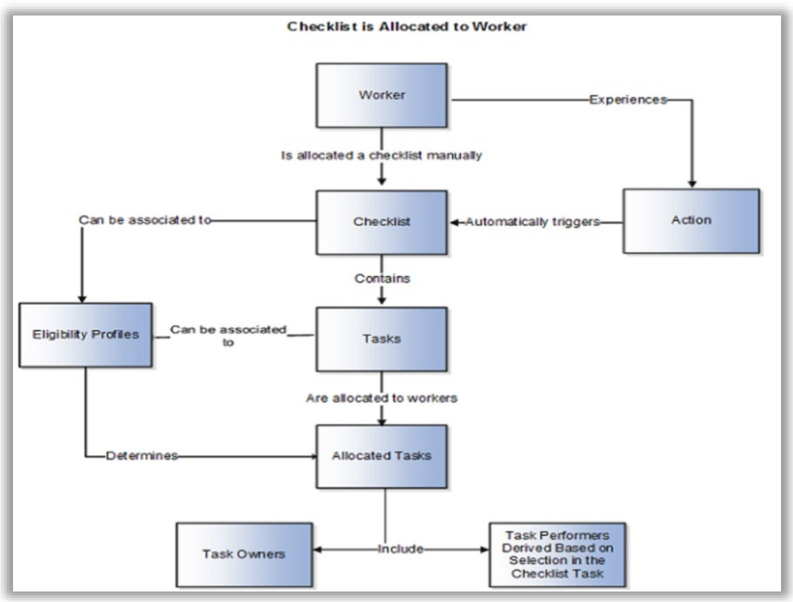
This guide is intended to assist Admin users with their day-to-day tasks in Oracle Cloud. A few notes before you begin:

- Any fields with an asterisk are required fields.
- Based on your configurations, approval workflows may in place for the training topics below; those tasks would need to be approved before the additions or updates are visible in your instance.
- You may have specific flexfields in your instance that require inputs; this guide is a generic tool and will not include those specific flexfields. You will see those fields as a context segment or not visible at all in our Oracle instance.

Overall Process Flow

Before we begin with the training content, it's important to understand the overall process flow of information in Oracle Cloud for the HCM (Preboarding, Onboarding, and Offboarding) module.





Glossary of Terms

Here we've included common terms associated to the HCM (Preboarding, Onboarding, and Offboarding) module. Please review the terms below to familiarize yourself with the Oracle Cloud terms used throughout this guide.

Assigned Journey

- Journey created and assigned to a group

Journey

- Collection of sequential tasks grouped by type or experience for employees

Task

- An item within a Journey that requires completion by the performer

Enterprise Onboarding

- An Enterprise Onboarding checklist template is a specific checklist that you create to onboard new hires either before, on, or after their joining date. Line managers, HR specialists, and employees use the Onboarding work area to access, manage, and complete tasks related to onboarding.

Enterprise Onboarding Step

- Can be configured as an individual task or a list of tasks, which are then associated to the master Enterprise Onboarding checklist.

Off Boarding

- Category of checklist tasks which is used for the offboarding of an employee during a termination event.

On Boarding

- Category of checklist tasks which can be used for any other tasks required.

Manual Task

- Create a task that workers need to perform outside of the application.

Video

- Requires you to add an embedded URL if you want the video to open up in the same window, else it will open up in a new tab or window.

Document

- Attach a document that workers can download, see, and read as part of their tasks

Report

- Specify and include a link to a published BI report.

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.

External URL

- Define an external URL that workers will use to perform the task

I-9 Verification

- Enables users to update or verify personal details during I-9 employment eligibility verification (US specific only) using HireRight

Electronic Signature – DocuSign

- Allows users to electronically sign the document in DocuSign. Requires integration with third-party service provider, DocuSign.

Electronic Signature

- Create a task where workers can provide their consent by entering their name and email address. There are three types:
    - Standard
        - This signature type is the most basic functionality and requires the least amount of setup & maintenance, at the trade off of limited functionality
    - Document Record
        - This signature type used the same basic functionality as the standard electronic signature, however requires further setup to create documents which once signed, will be transferred to the EE's document records for retention and requires creation of a BI Publisher Data Model
    - DocuSign
        - This signature type gives the most flexibility in data entry/completion, however requires the most setup and has potential cost implications and requires DocuSign Licensing

Questionnaire

- Add a questionnaire to collect feedback from workers

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

Task Type

- 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 checklist category

Attachments & Comments

- Allows the performer to add attachments and comments when performing the task

Task Duration

- Time period in which the task is available for completion

Task Performer

- Task performer is the person who carries out the task

Task Owner

- Task owner is the person responsible for ensuring task completion

Notifications & Reminders

- Task performers receive a notification when you assign a task to them

Notes

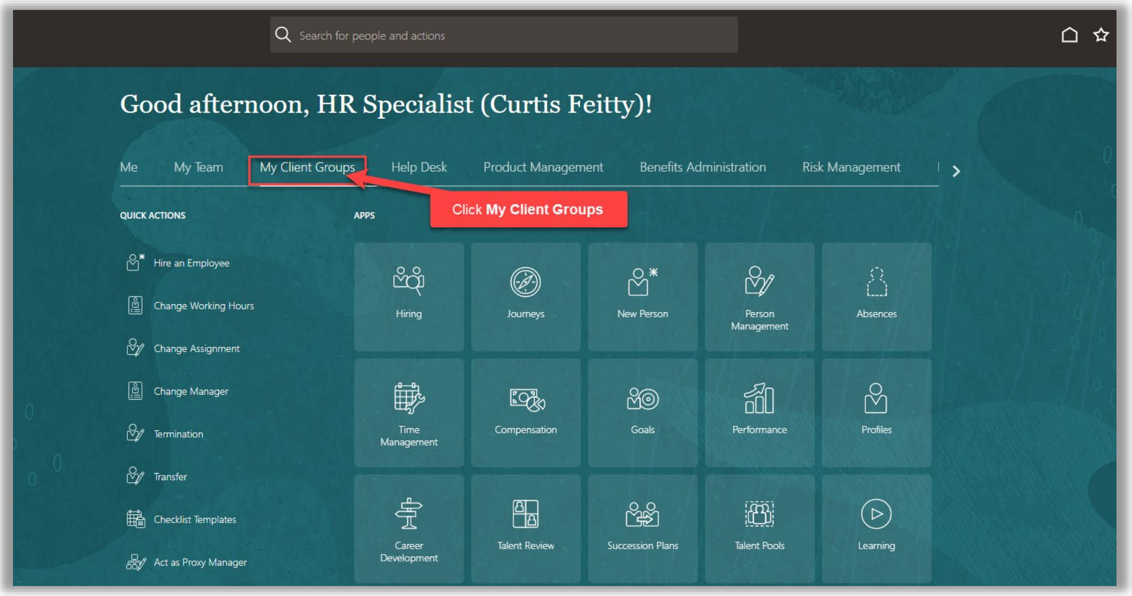
- Include instructions and details for task performers on how and where to perform the task

Administration

Create A Journey

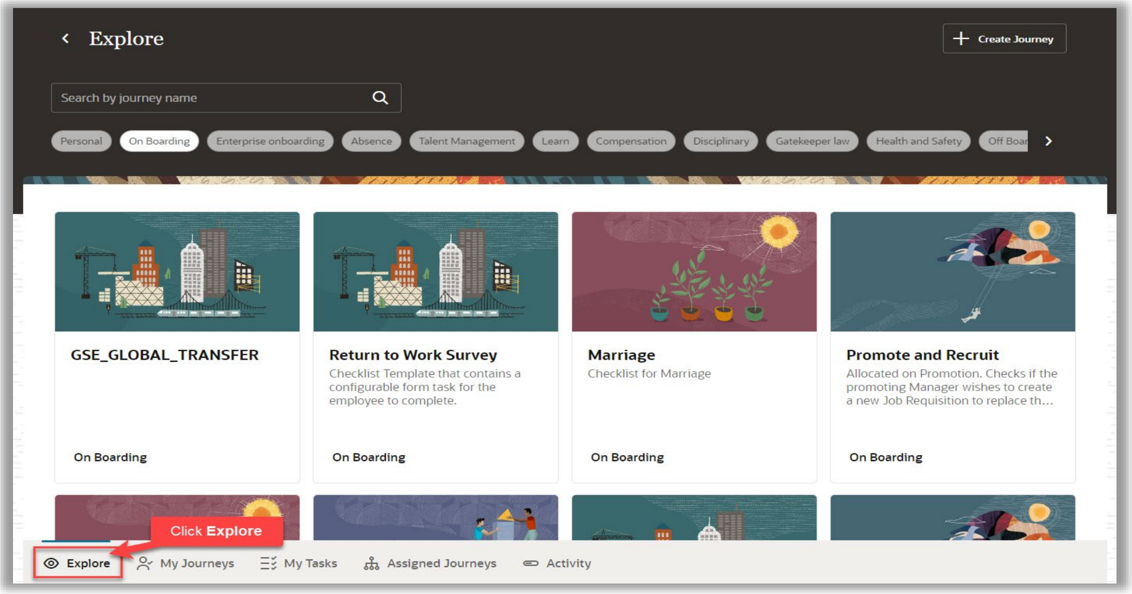
Navigation: Home>My Client Groups>Journeys>Create Journey>Submit

From the home screen, click **My Client Groups**

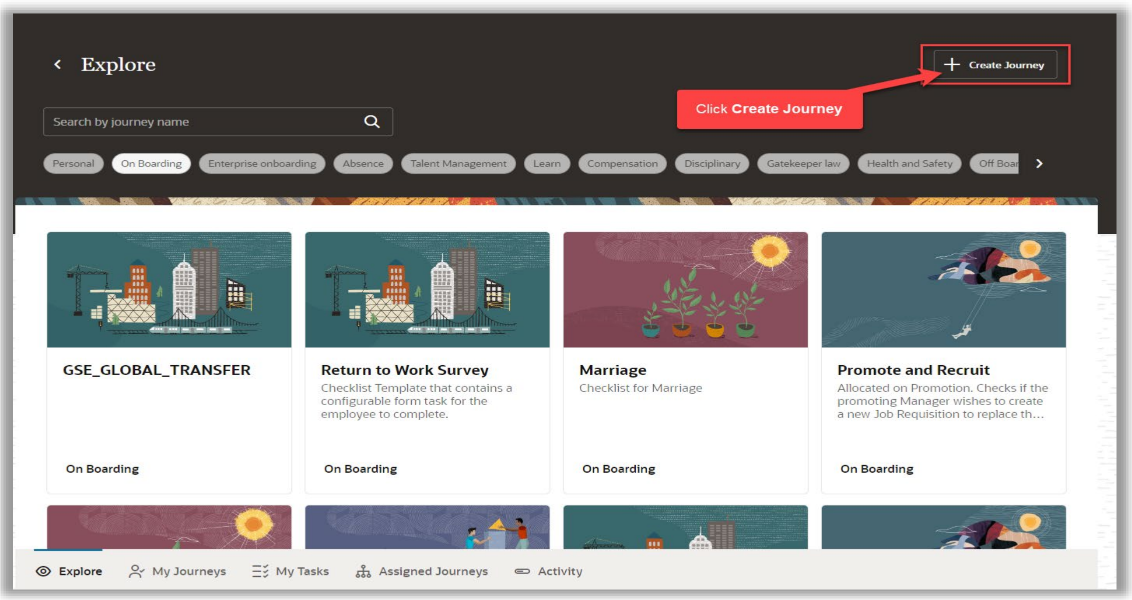


Click **Journeys**

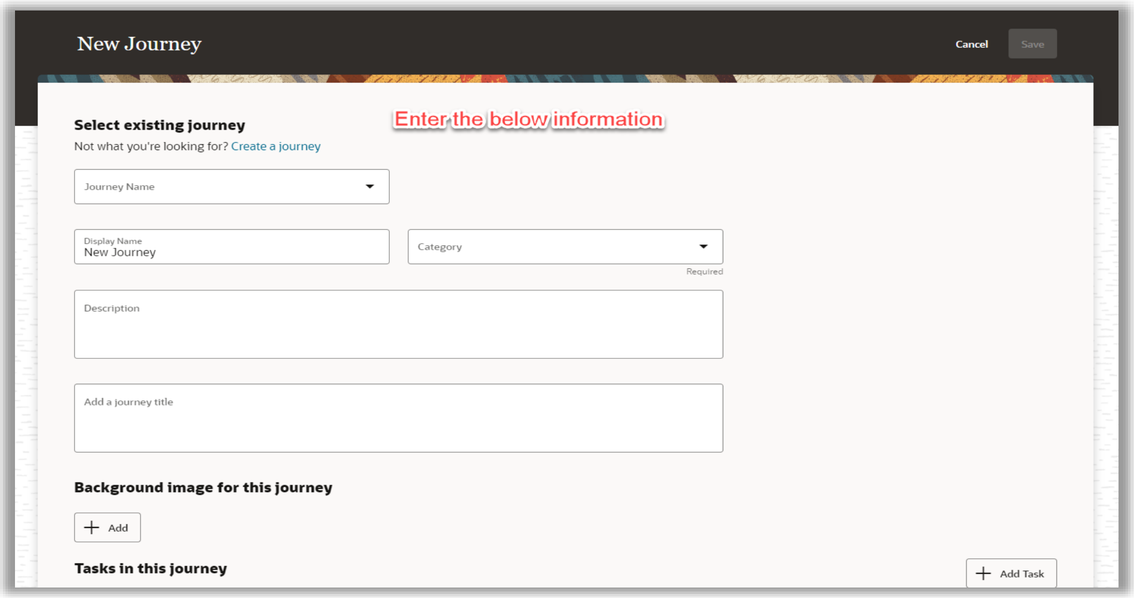
Click **Explore**



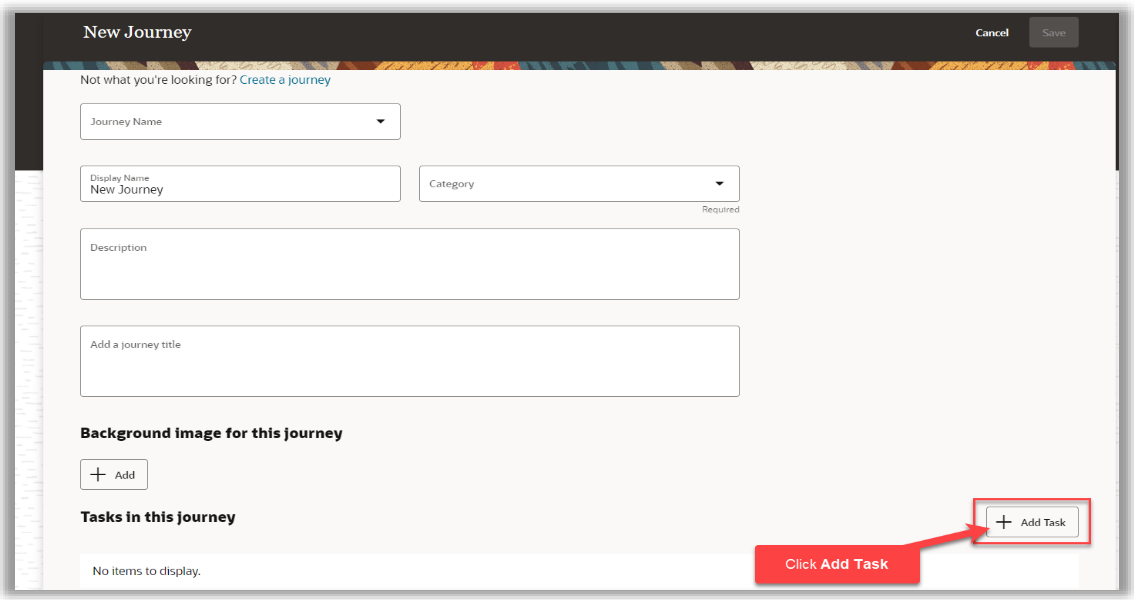
Click **Create Journey**



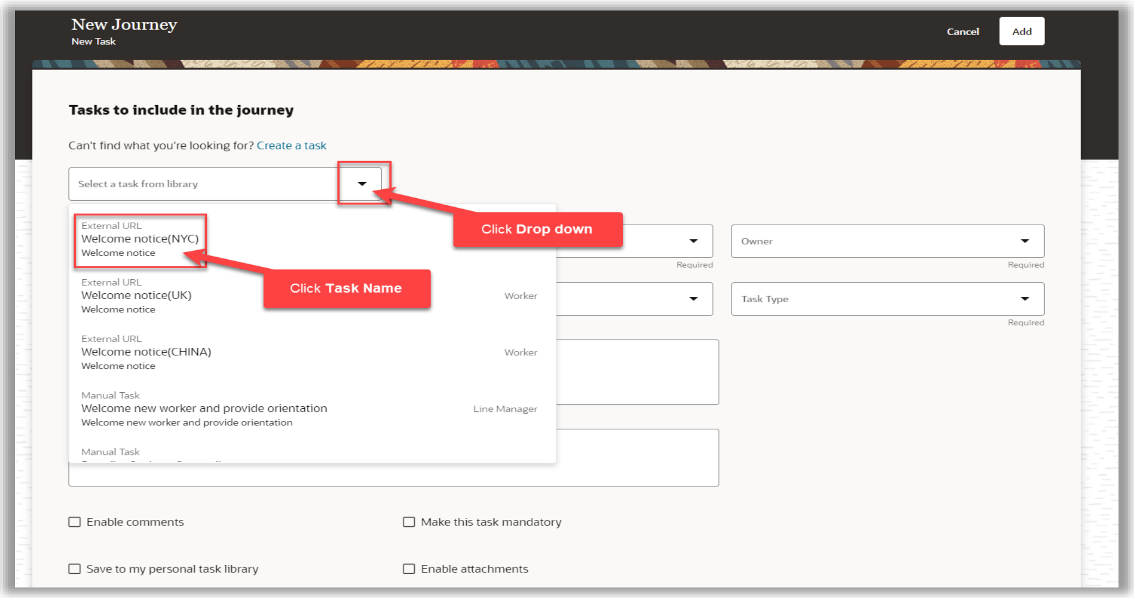
Next, Enter the below information



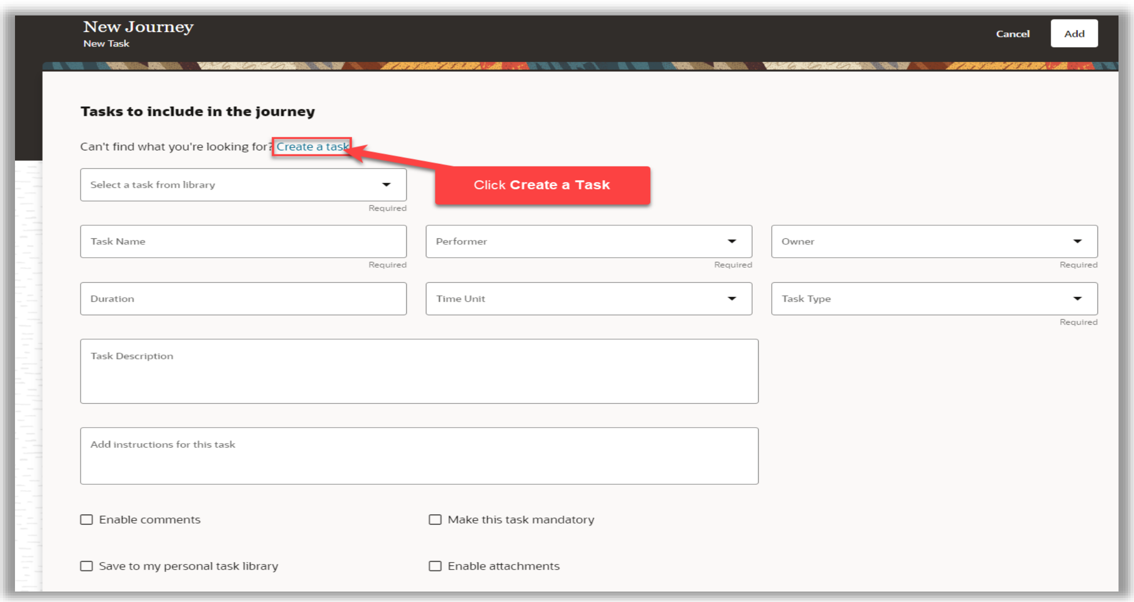
To add tasks to this Journey, click **Add Tasks**



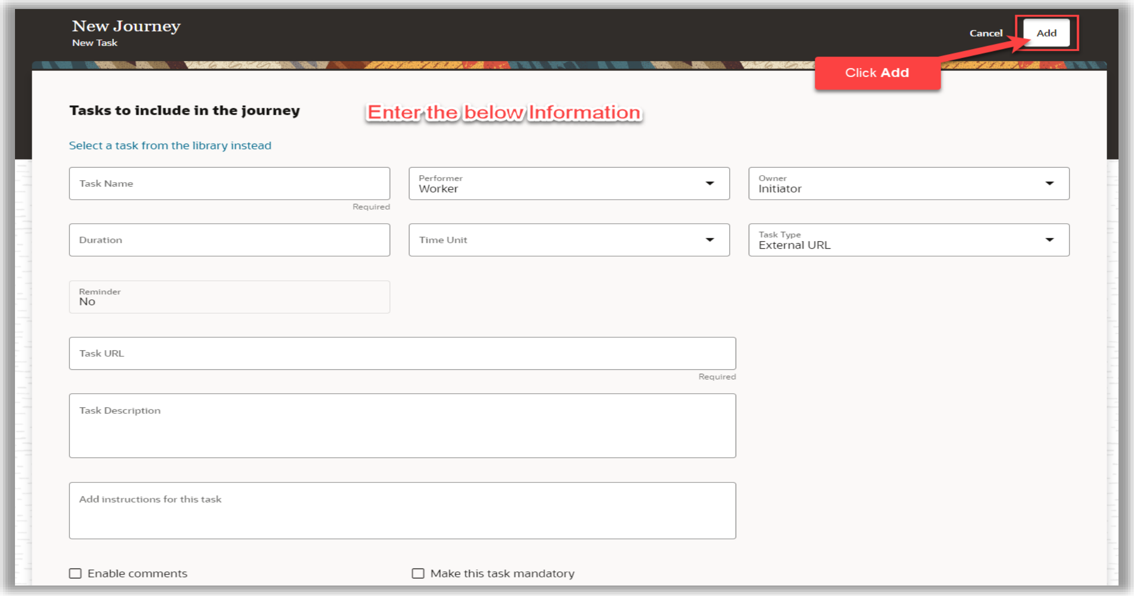
Next, we can select an existing task from the **Task Library** or we can **Create A Task.** To select a task from the **Task Library**, click the dropdown and click the **Task Name**



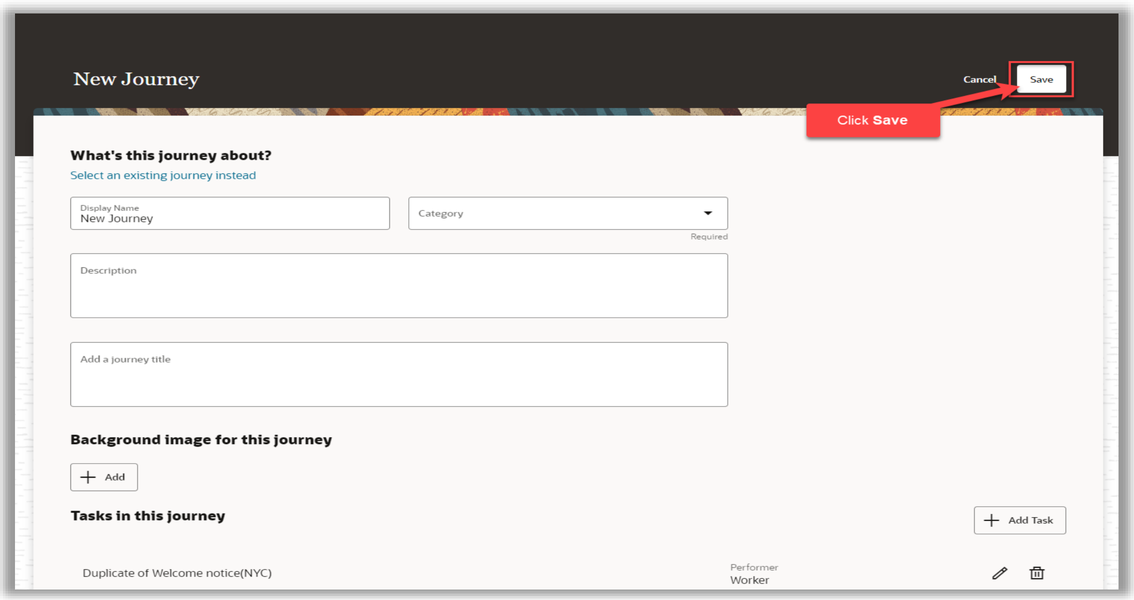
To Create a new task, click **Create a Task**



Enter the **Task** Information and click **Add** to add this task to the Journey



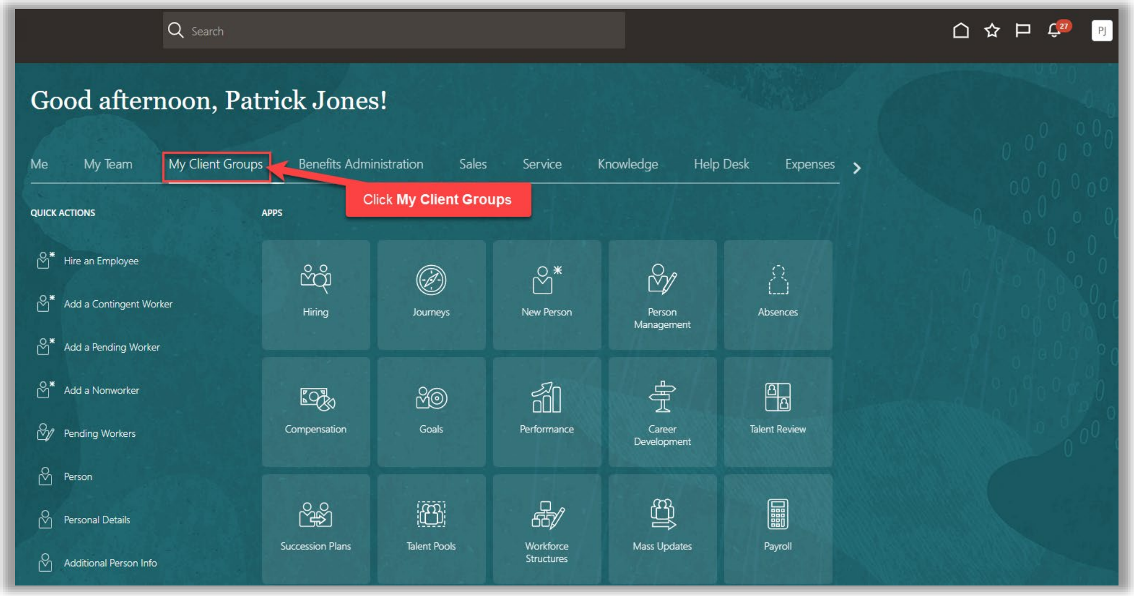
Lastly, Click **Save** to create the **Journey**



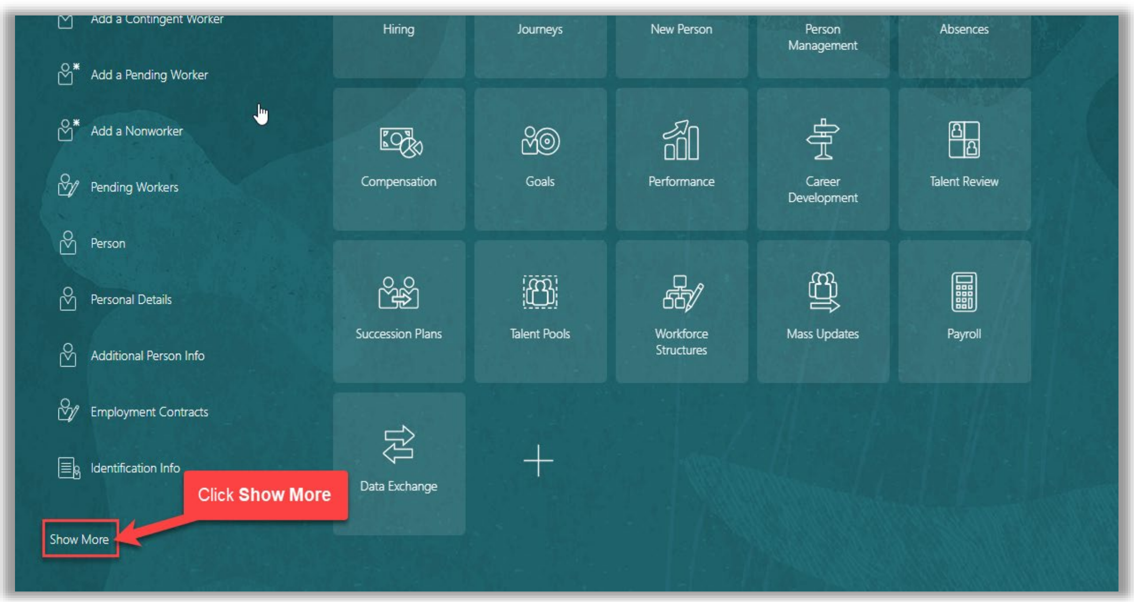
Create A Task

Navigation: Home>My Client Groups>Quick Actions>Checklist Templates>Task Library>Create>Submit

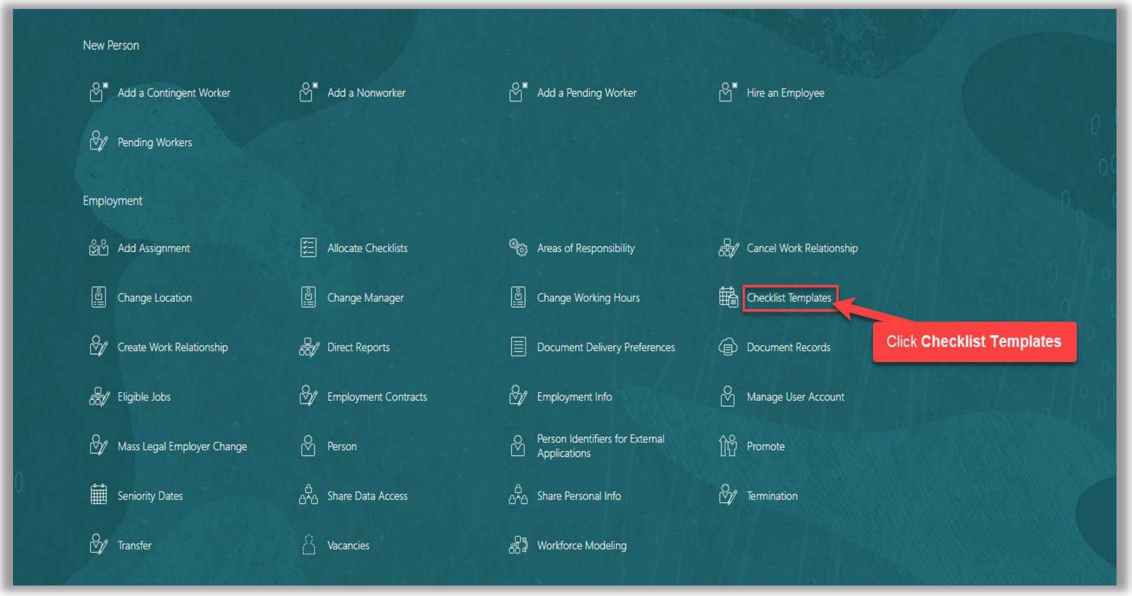
From the home screen, click **My Client Groups**



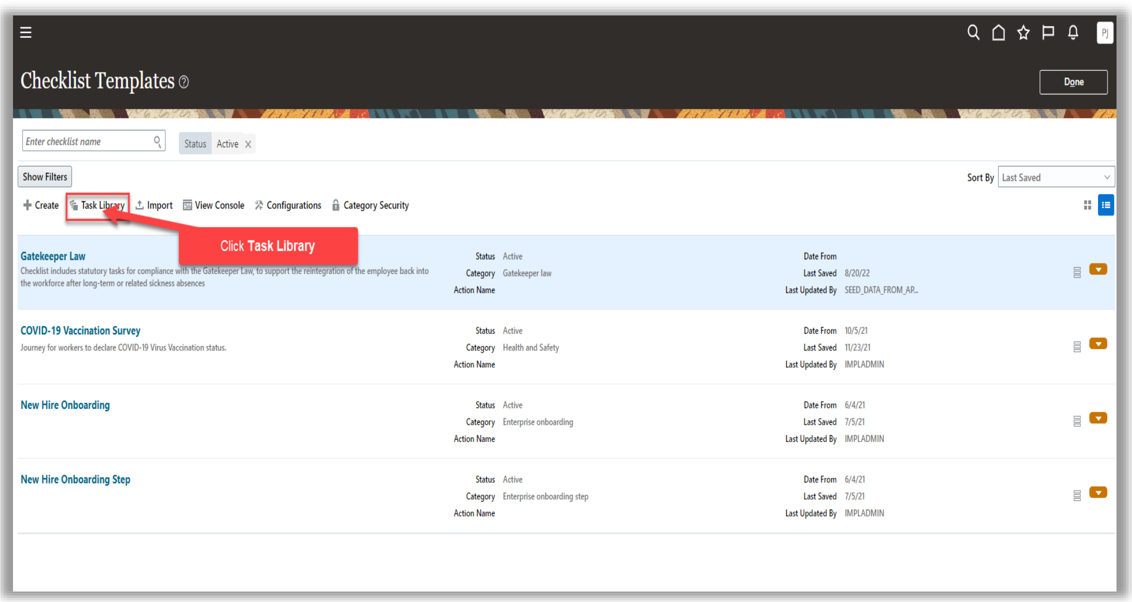
Scroll down and Click **Show More** from the quick actions



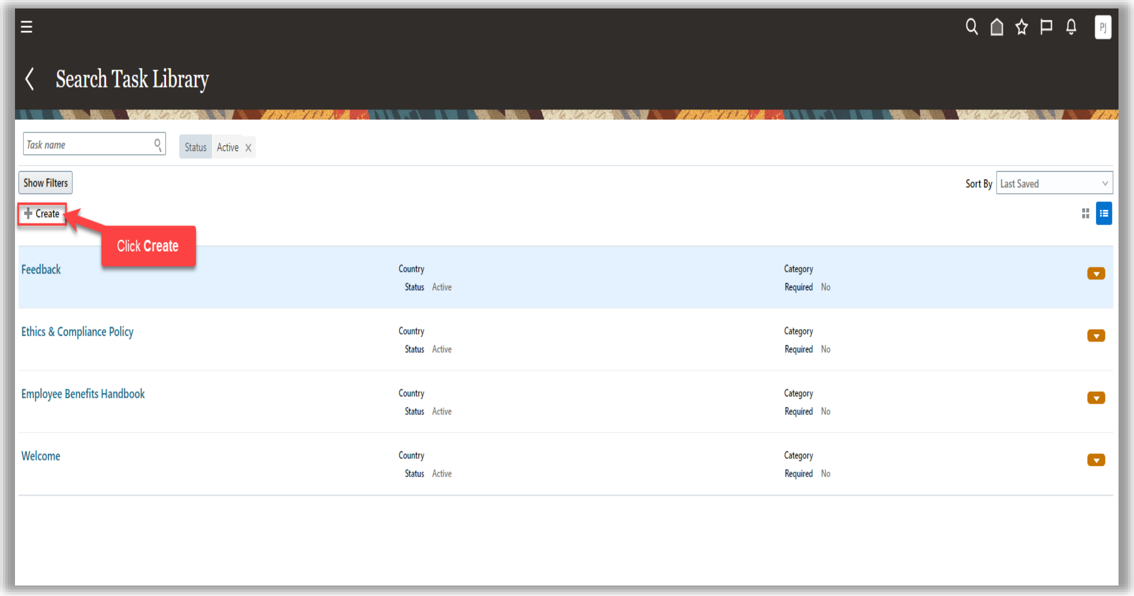
Under Employment, click **Checklist Templates**



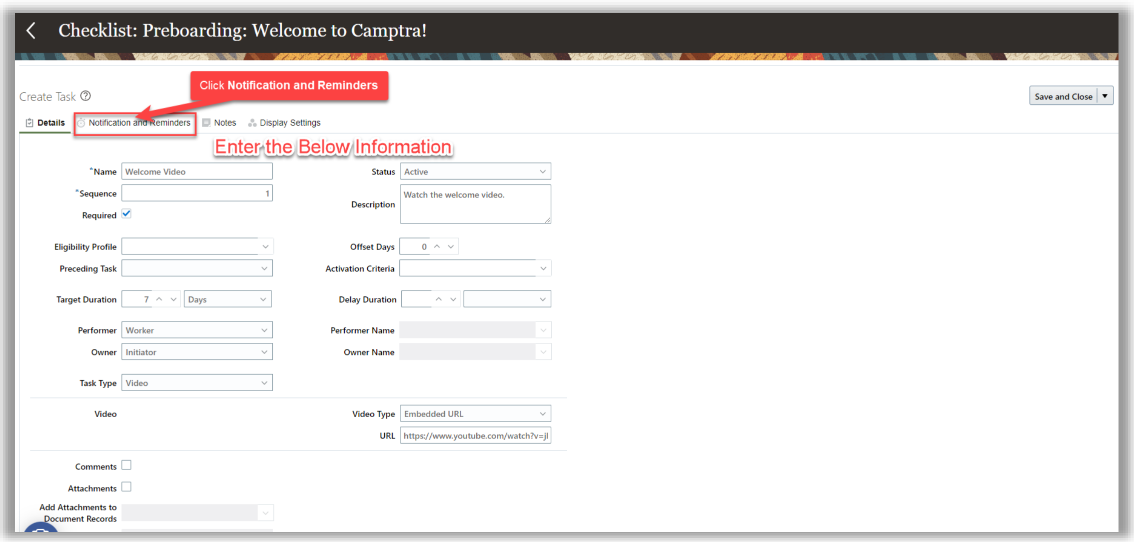
Click **Task Library**



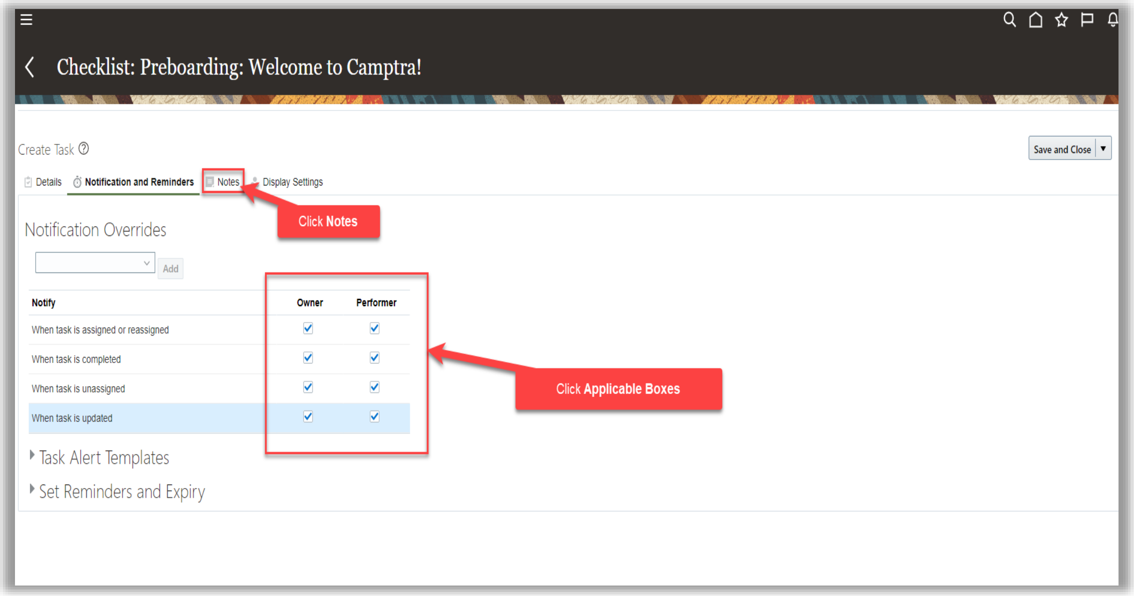
Click **Create**



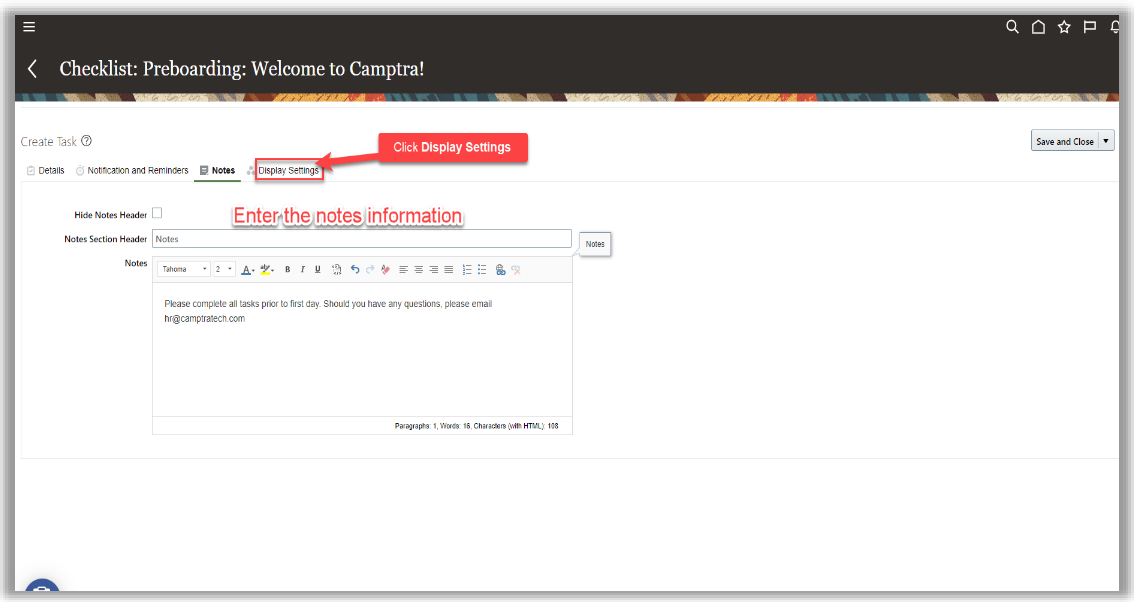
Enter the required information in the **Details** tab for the **Task** then click the tab **Notification and Reminders**



In this screen, we can set the **Notification and Reminders**. Check the applicable boxes and click **Notes**



In the Notes tab, we can add any applicable notes for the Task then click **Display Settings**

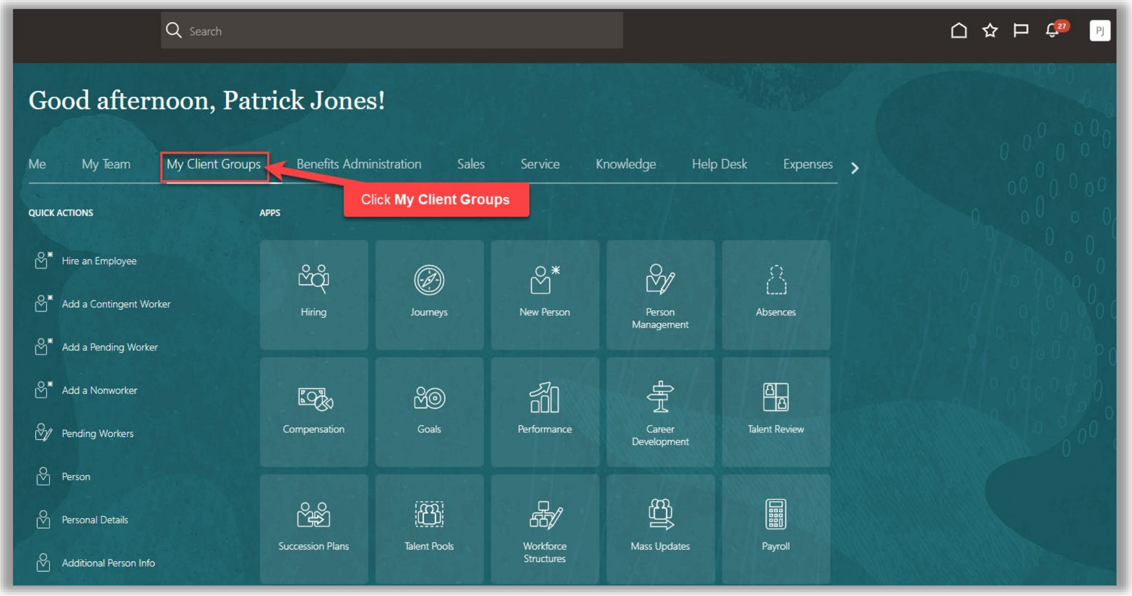


Update the **Display Settings**, if applicable and click **Save and Close**

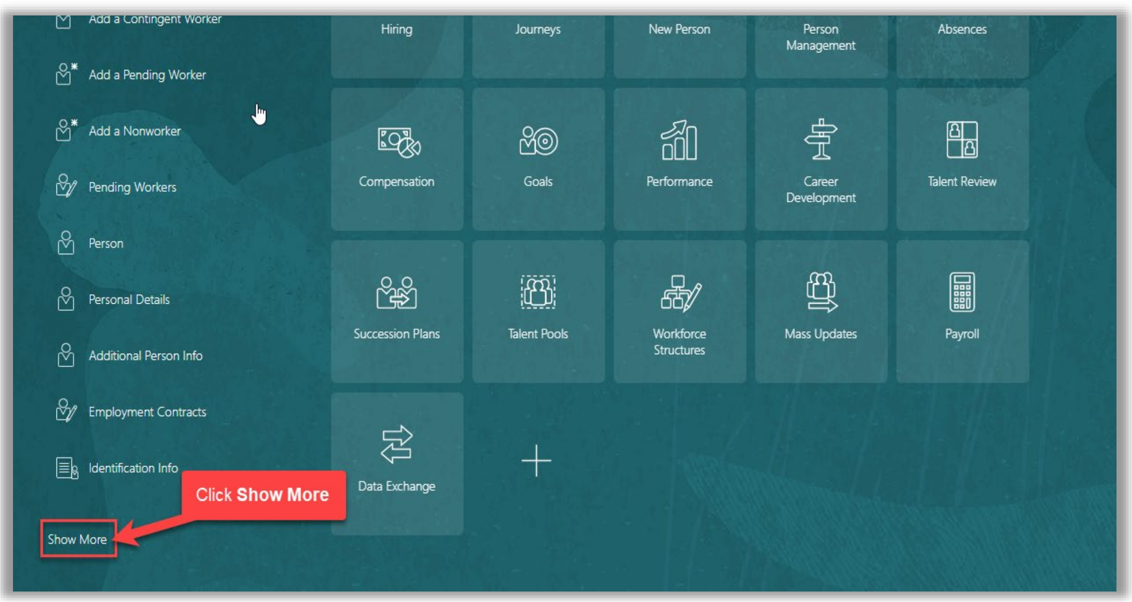
Manage Tasks

Navigation: Home>My Client Groups>Quick Actions>Checklist Templates>Task Library>Select Task>Update>Submit

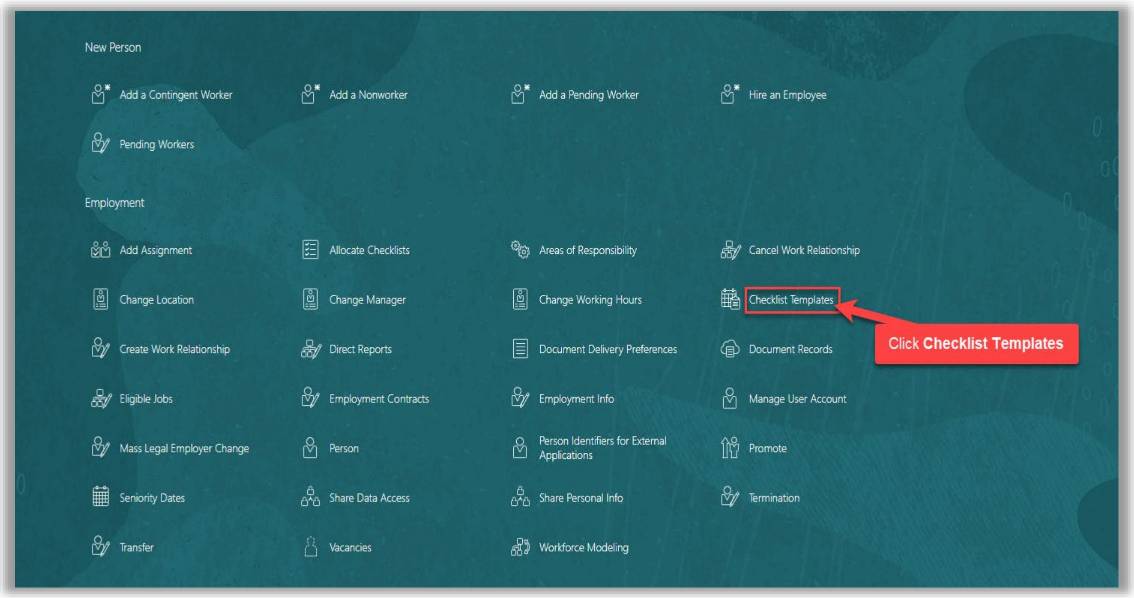
From the home screen, click **My Client Groups**



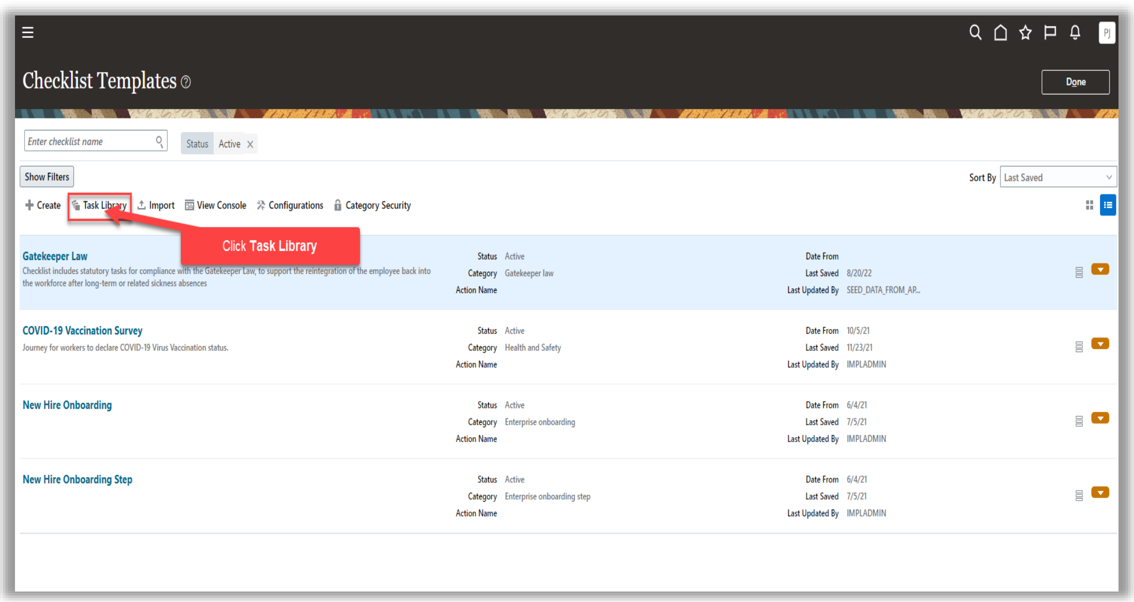
Scroll down and Click **Show More** from the quick actions



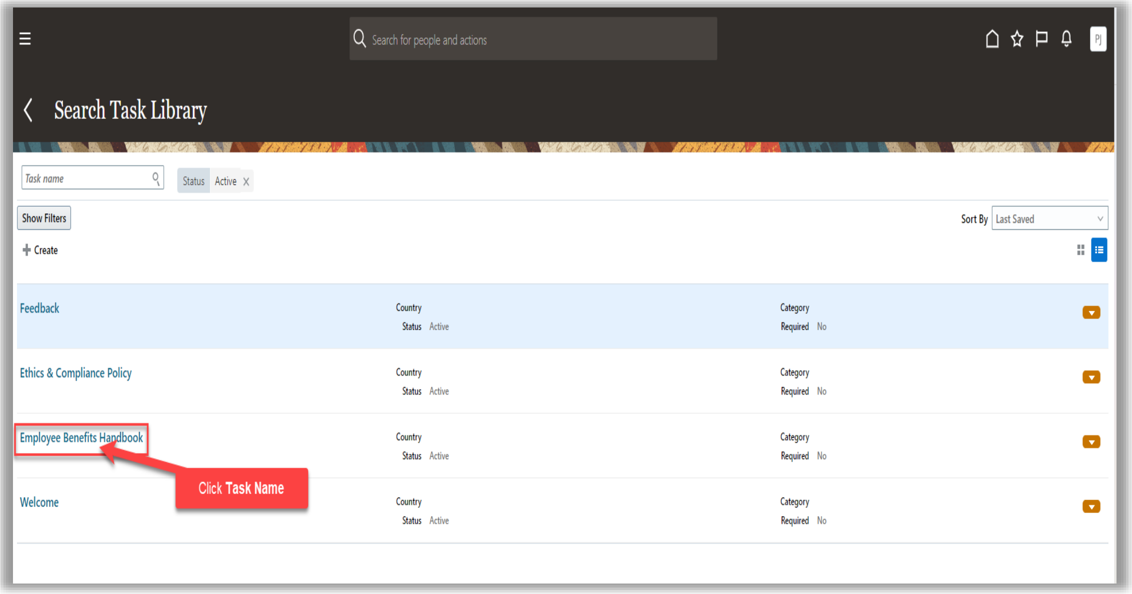
Under Employment, click **Checklist Templates**



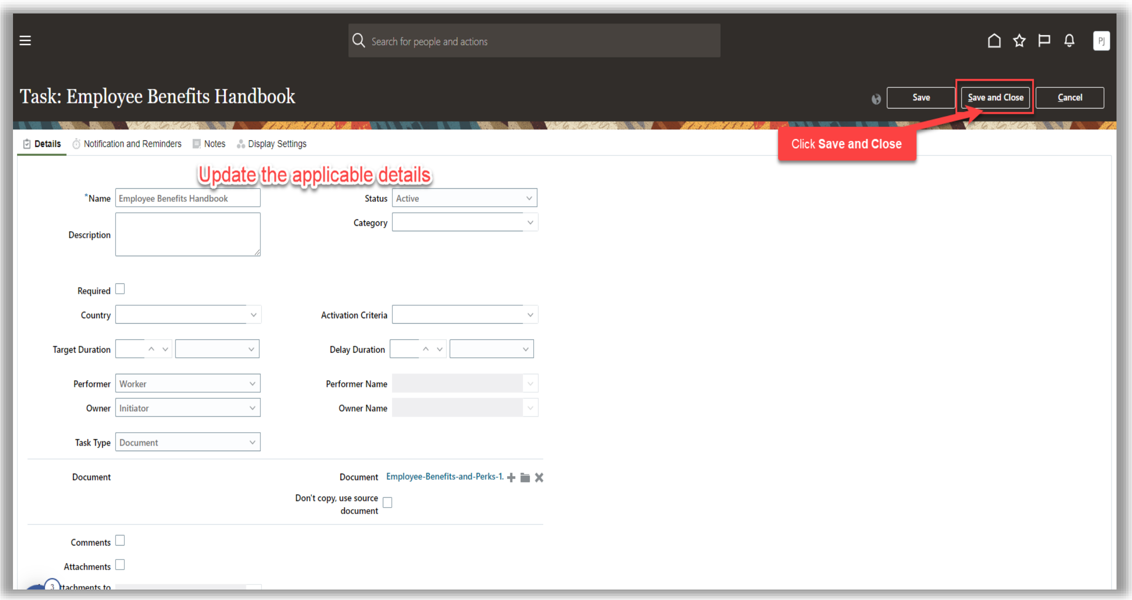
Click **Task Library**



Click **Task Name** to update the details



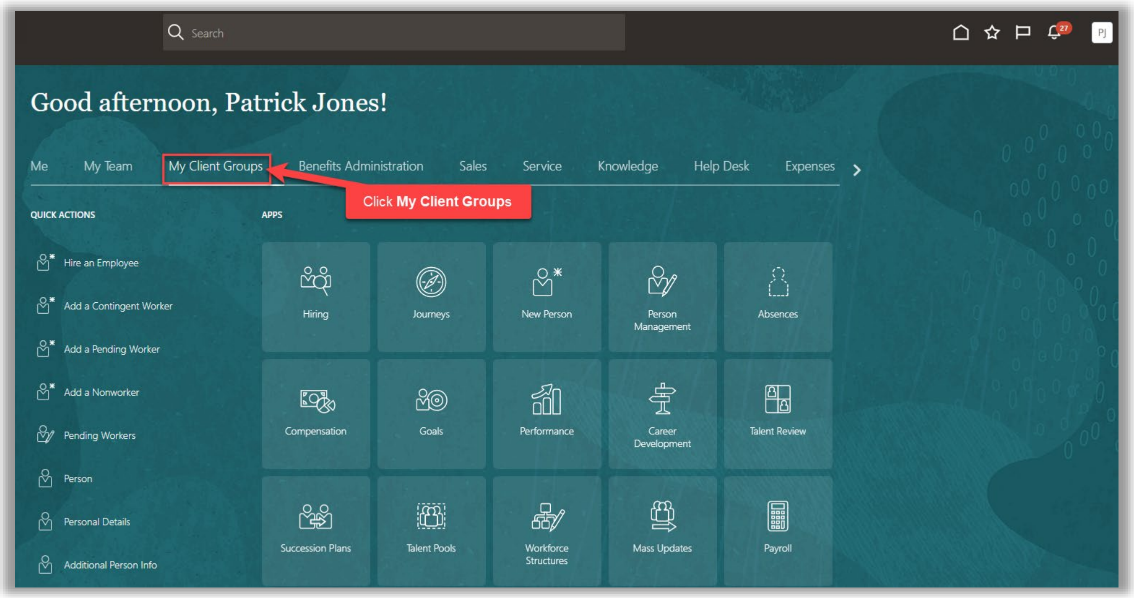
Update the applicable details and click **Save and Close**



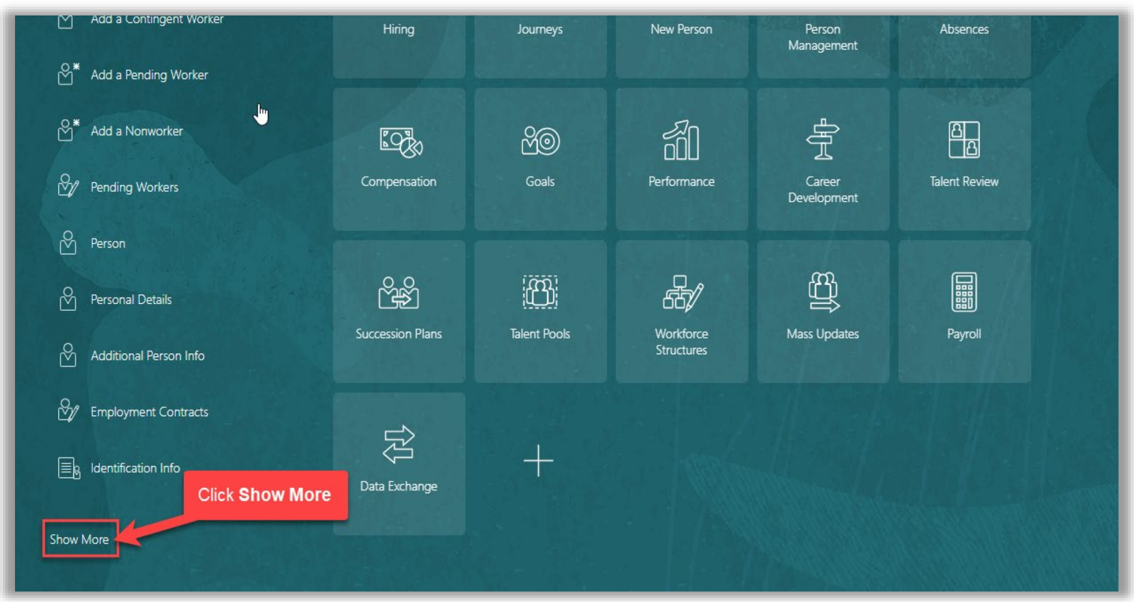
Manage Journeys

Navigation: Home>My Client Groups>Quick Actions>Checklist Templates>Select>Update>Submit

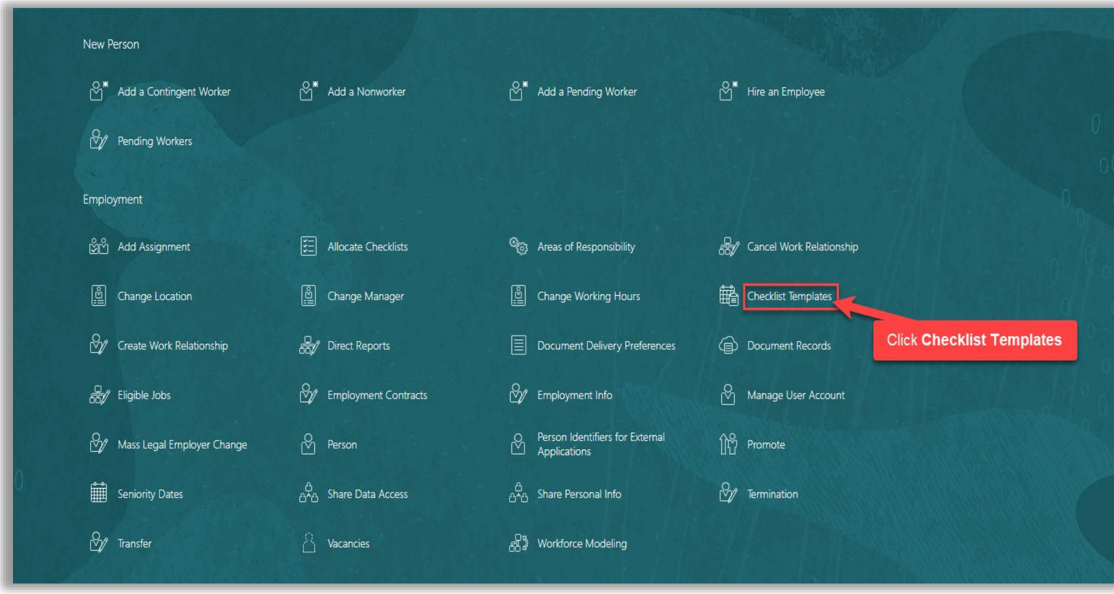
From the home screen, click **My Client Groups**



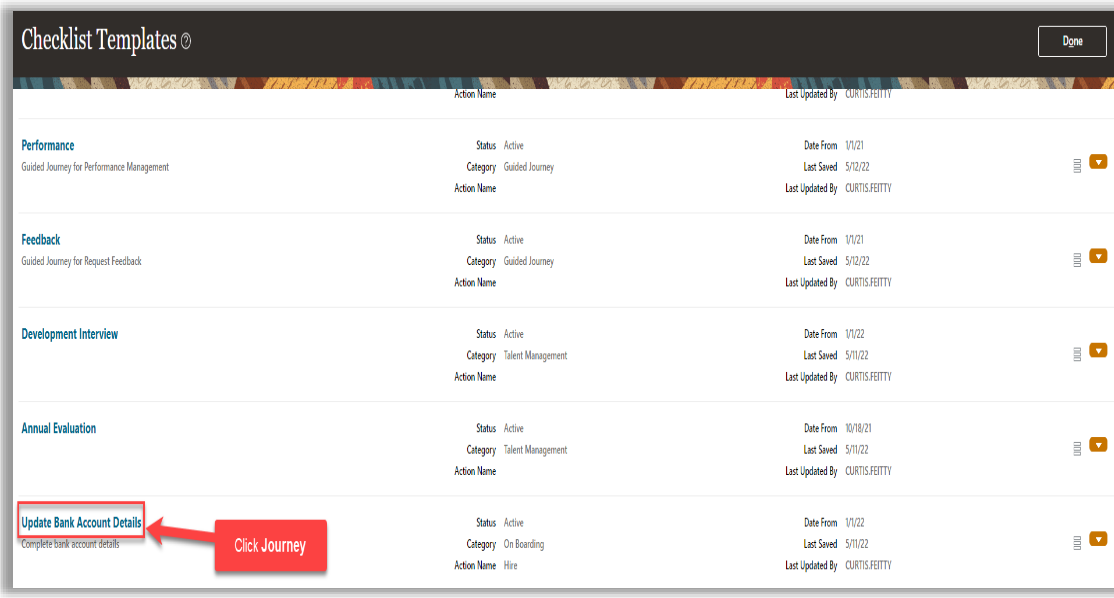
Scroll down and Click **Show More** from the quick actions



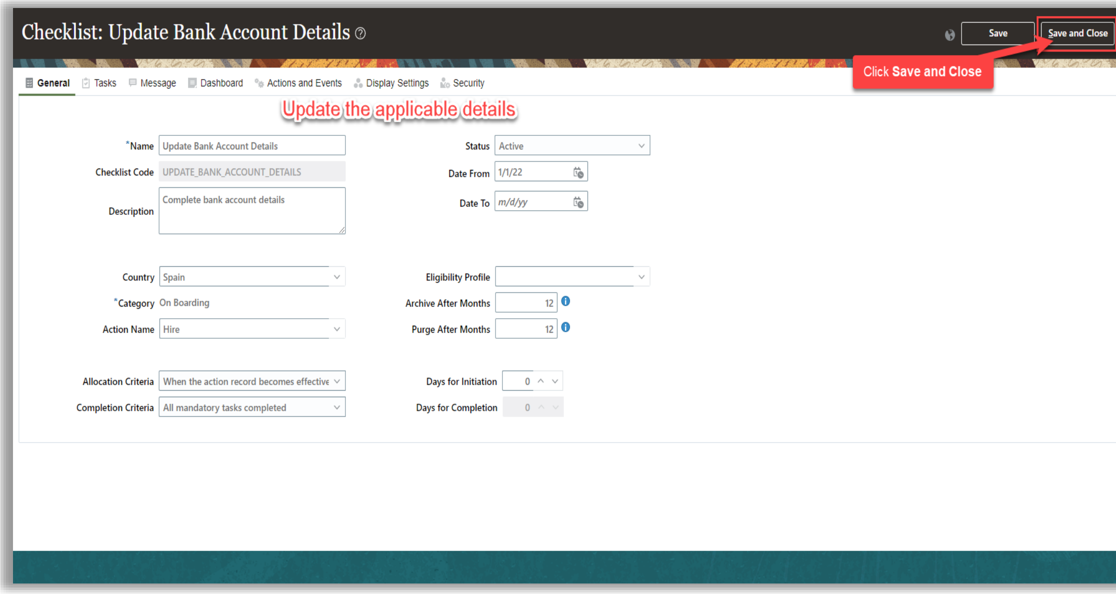
Under Employment, click **Checklist Templates**



Click **Journey Name** to update the applicable details



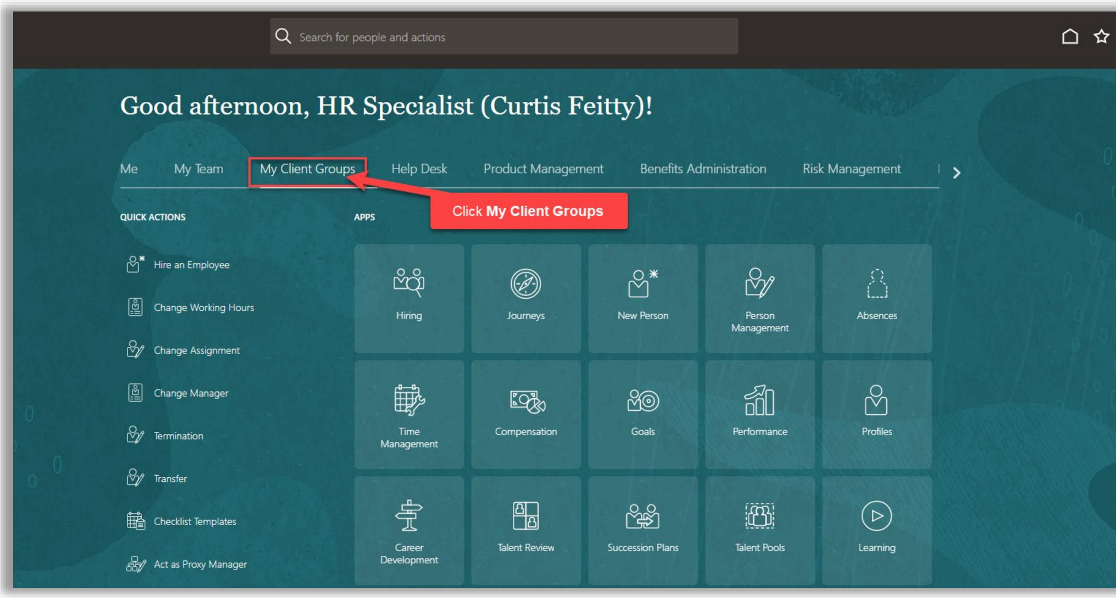
Update the applicable details and click **Save and Close**



Managed An Assigned Journey

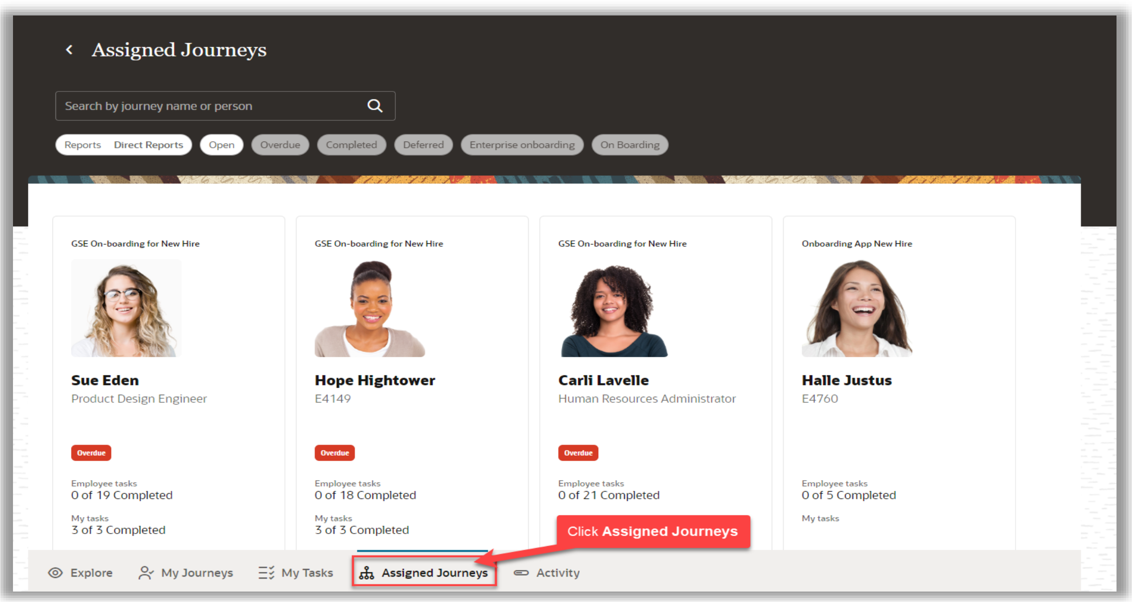
Navigation: Home>My Client Groups>Journeys>Update>Submit

From the home screen, click **My Client Groups**

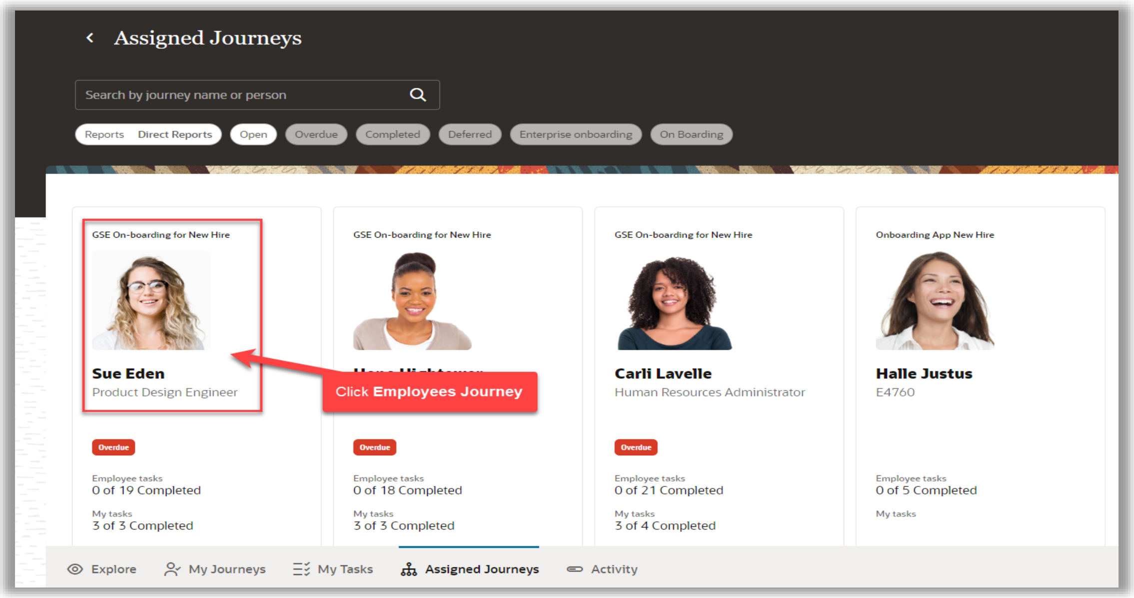


Next, Click **Journeys**

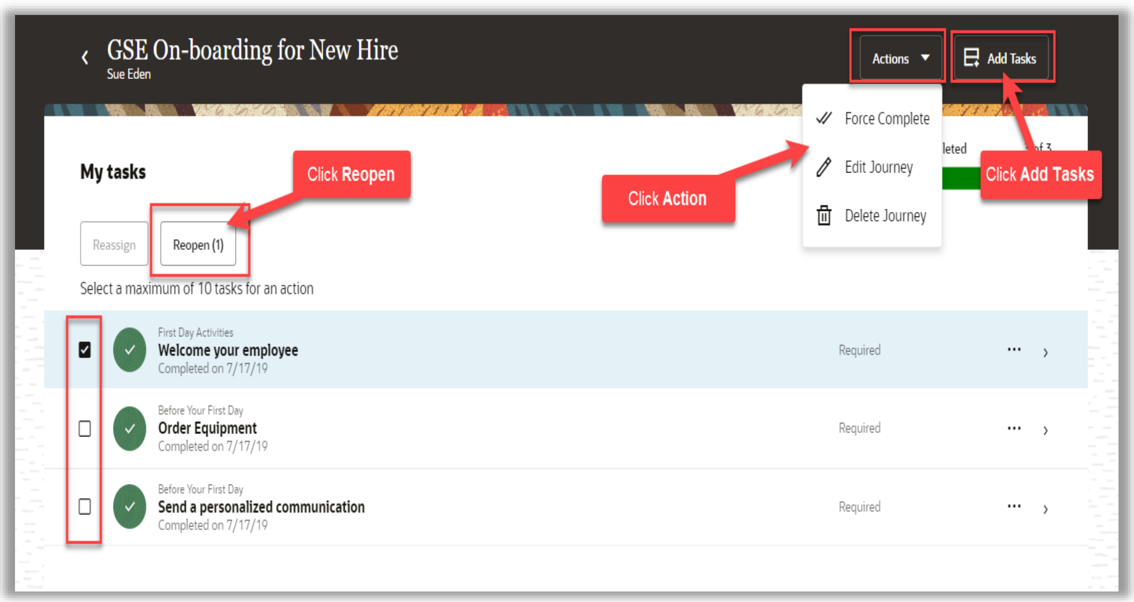
To manage an Assigned Journey, click **Assigned Journeys**



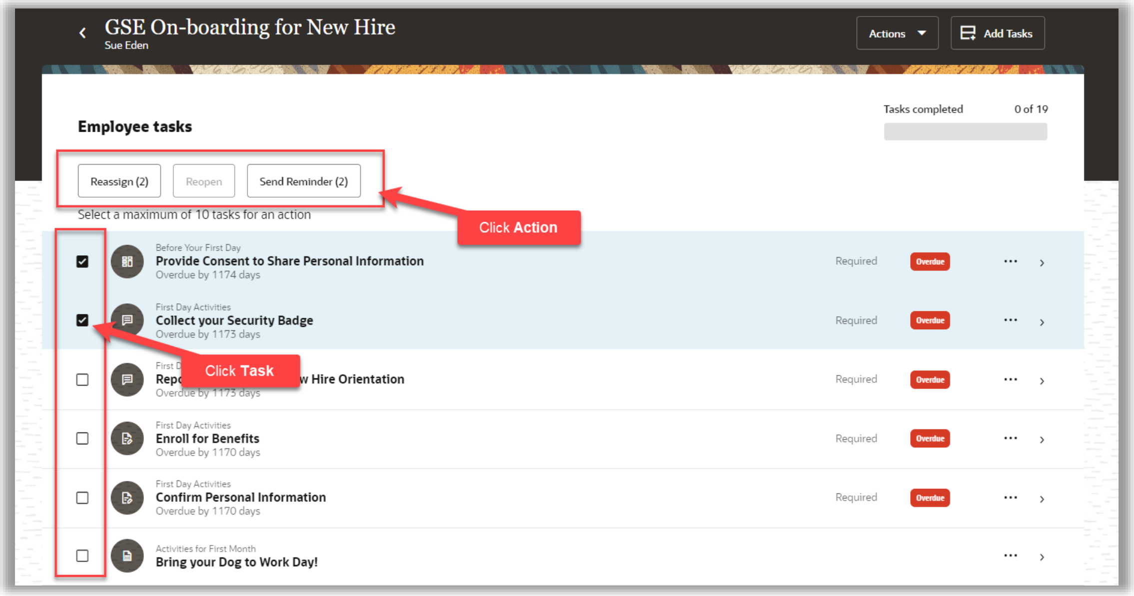
Select the **Employees Journey** we need to manage



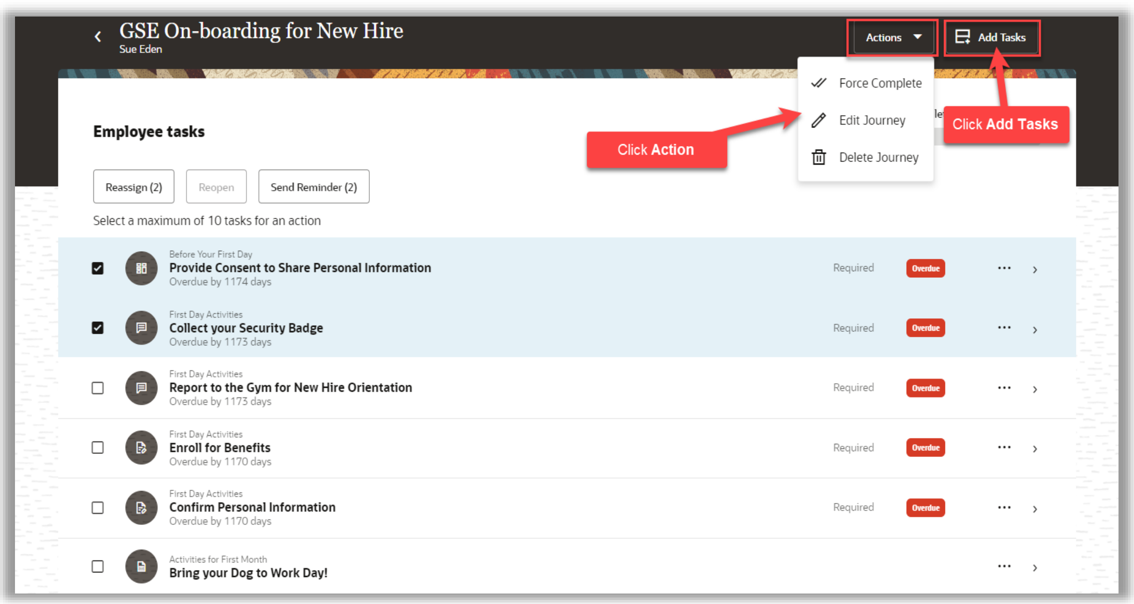
Select the task under **My Task** to **Reopen** the task, Click **Add Task** to add a Task to the Journey or **Actions** to **Complete, Edit,** or **Delete** the Journey



To manage the **Employee Tasks**, scroll down under **Employee Tasks.** Here we can select the tasks to **Reassign, Reopen,** or **Send Reminder**



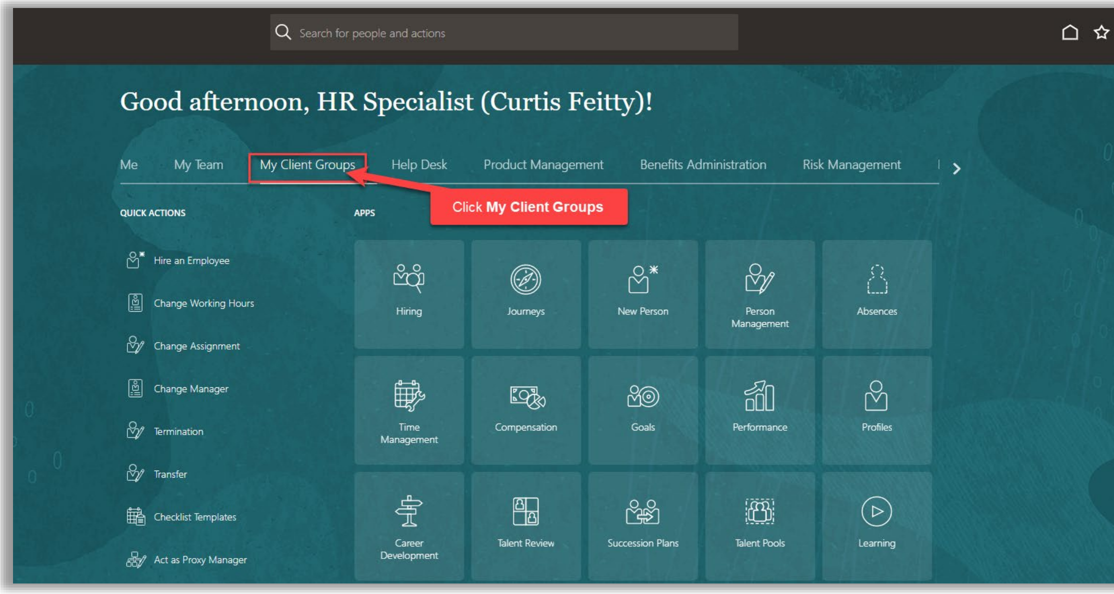
Additionally, we can **Add Tasks,** click **Actions to Force Complete, Edit Journey,** and **Delete Journey**



Assign An Existing Journey

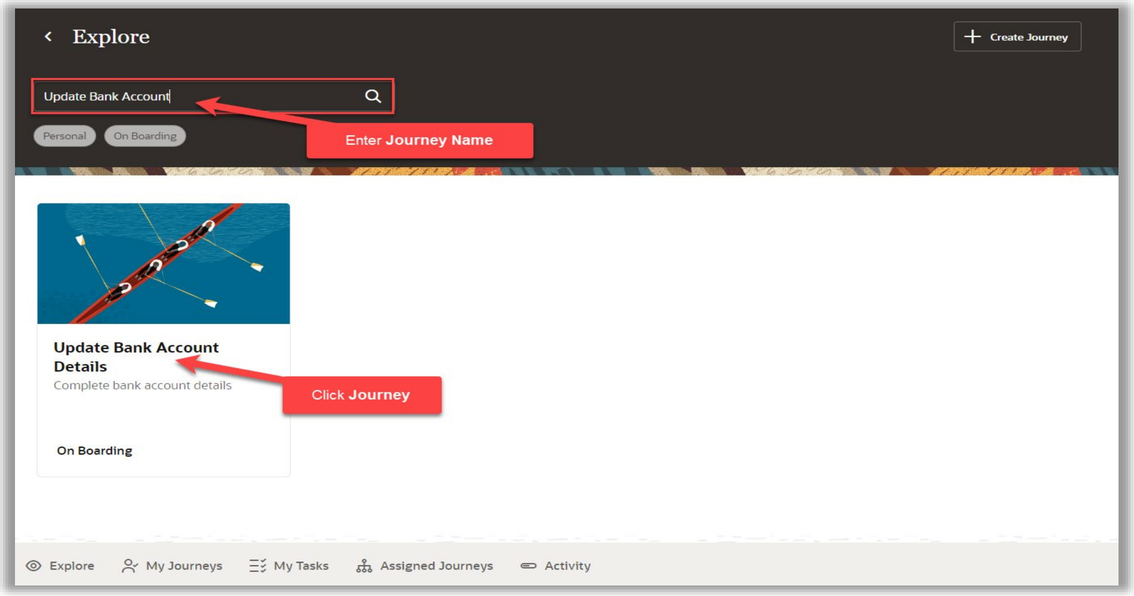
Navigation: Home>My Client Groups>Journeys>Search>Select Journey>Assign>Submit

From the home screen, click **My Client Groups**

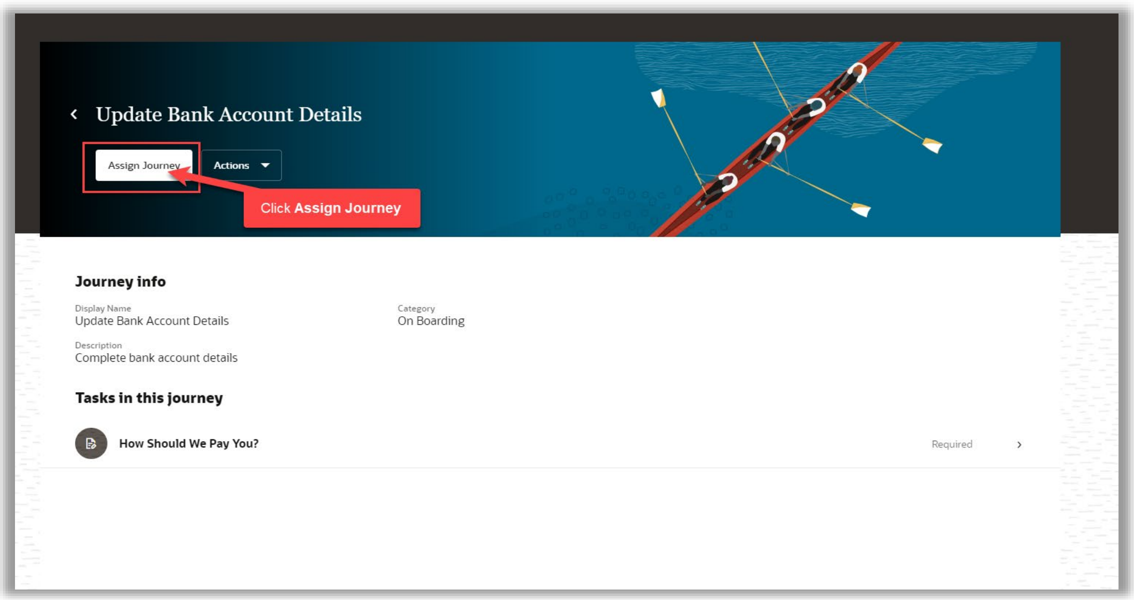


Next, Click **Journeys**

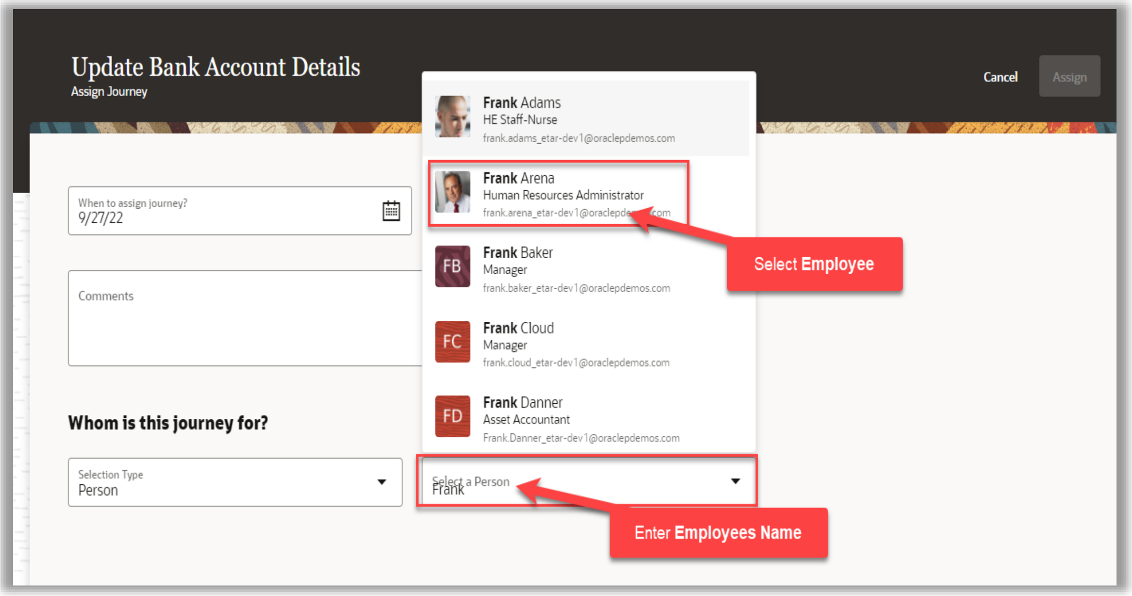
To assign an existing Journey to an employee, search for the **Journey** and click the **Journey**



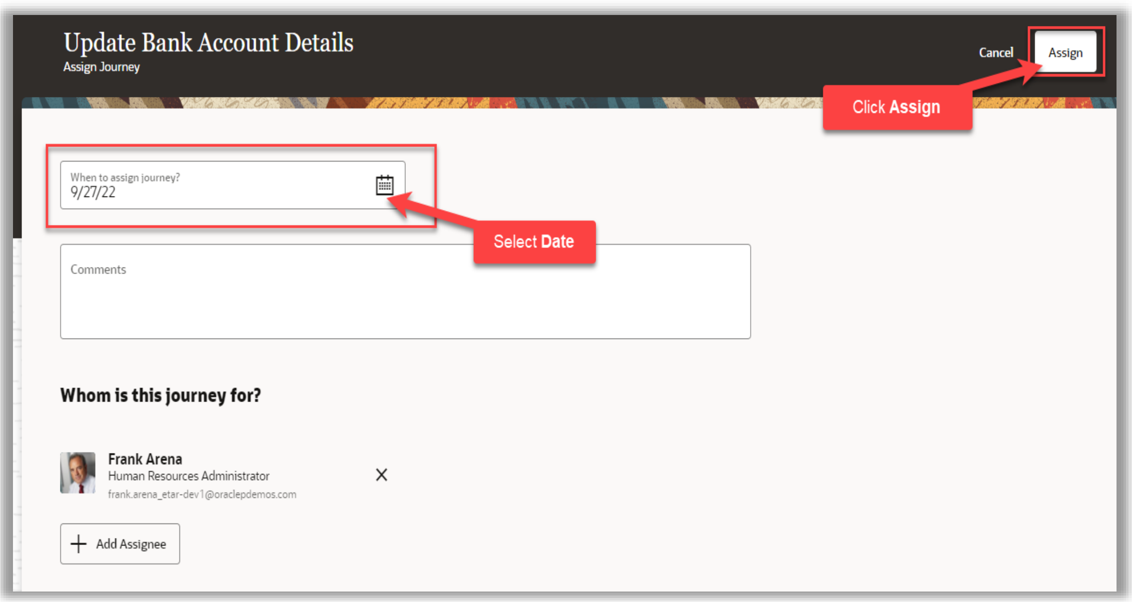
Click **Assign Journey**



Search the **Employees Name** and select the **Employee**



Enter the **When to assign journey** date, add a **Comment**, if applicable, and click **Assign** to assign the Journey to the employee



Thank you for reviewing and using our guide; we hope you have found it helpful. If you have any questions on the content included in this guide, please contact our Training & Learning team at learn@camptratech.com

Version History	Revision Date	Author	Changes
Version 1.0		Megan Ketter	Initial Version