



# 2024

## Journeys Admin Guide



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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](mailto:mketter@camptratech.com).

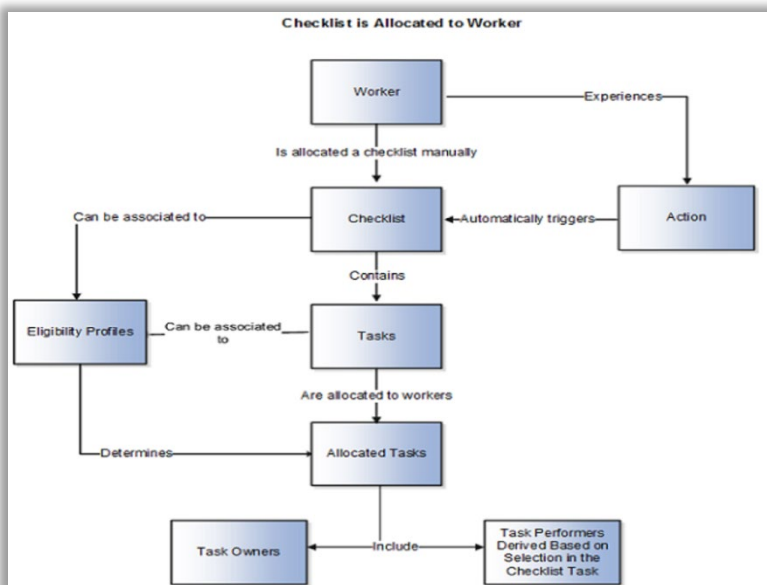
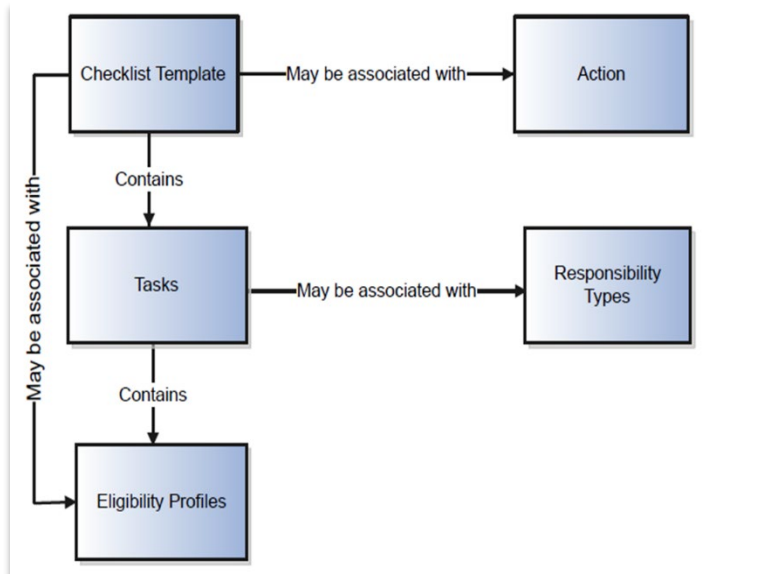
### How To Use This Guide

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**

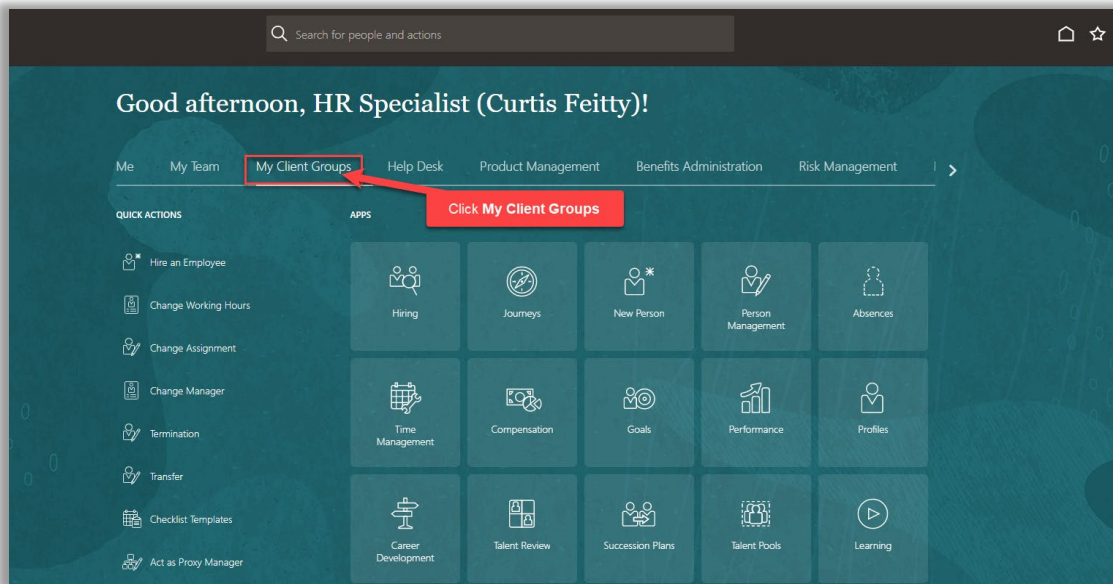
- 💡 Include instructions and details for task performers on how and where to perform the task

## Administration

### Create A Journey

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

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

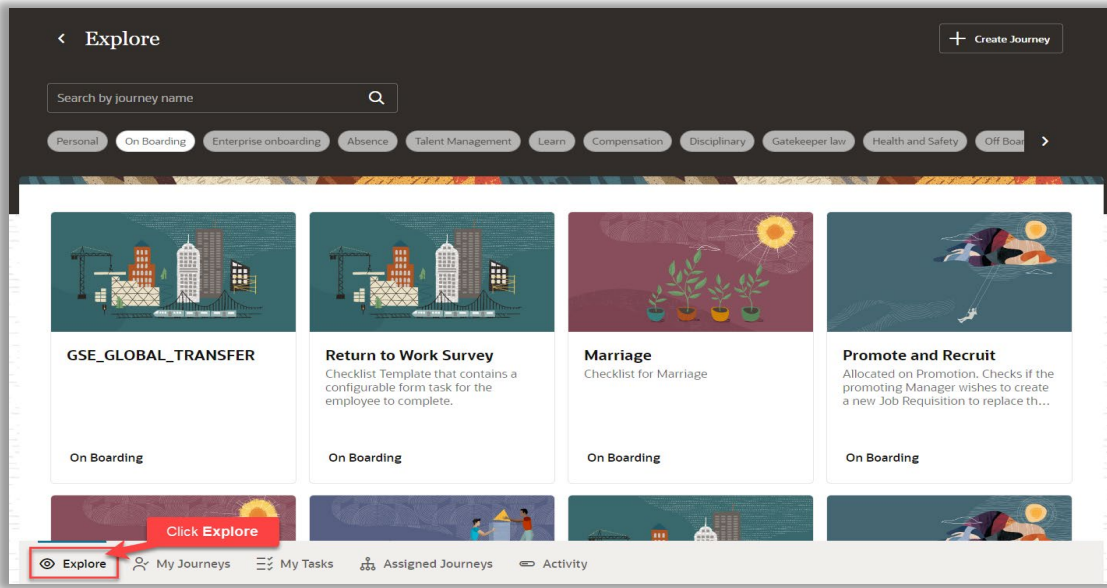


Click **Journeys**

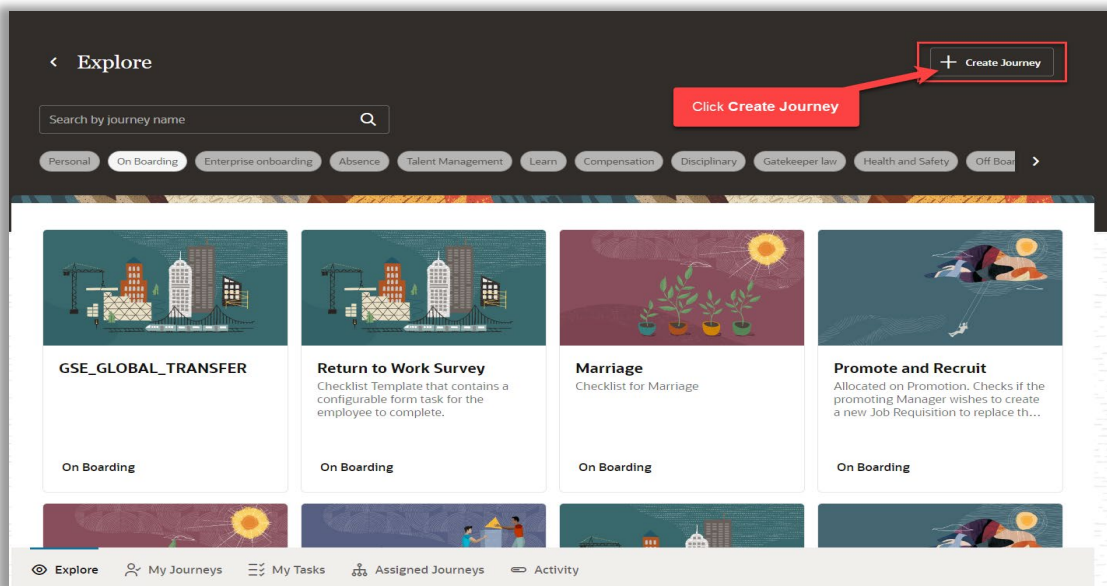


Click **Explore**





Click Create Journey



Next, Enter the below information

**New Journey** Cancel Save

**Select existing journey**  
Not what you're looking for? [Create a journey](#)

**Enter the below information**

Journey Name ▼

Display Name  
New Journey

Category ▼ Required

Description

Add a journey title

**Background image for this journey**

+ Add

**Tasks in this journey** + Add Task

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

**New Journey** Cancel Save

Not what you're looking for? [Create a journey](#)

Journey Name ▼

Display Name  
New Journey

Category ▼ Required

Description

Add a journey title

**Background image for this journey**

+ Add

**Tasks in this journey**

No items to display.

+ Add Task

Click Add Task

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**

**New Journey**  
New Task

Cancel Add

**Tasks to include in the journey**

Can't find what you're looking for? [Create a task](#)

Select a task from library

External URL  
Welcome notice(NYC)  
Welcome notice

External URL  
Welcome notice(UK)  
Welcome notice

External URL  
Welcome notice(CHINA)  
Welcome notice

Manual Task  
Welcome new worker and provide orientation  
Welcome new worker and provide orientation

Manual Task

Click Drop down

Click Task Name

Owner

Task Type

Required

Required

Required

Worker

Worker

Line Manager

☐ Enable comments

☐ Make this task mandatory

☐ Save to my personal task library

☐ Enable attachments

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

**New Journey**  
New Task

Cancel Add

**Tasks to include in the journey**

Can't find what you're looking for? [Create a task](#)

Select a task from library

Task Name

Duration

Task Description

Add instructions for this task

Click Create a Task

Performer

Owner

Time Unit

Task Type

Required

Required

Required

Required

☐ Enable comments

☐ Make this task mandatory

☐ Save to my personal task library

☐ Enable attachments

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

**New Journey**  
New Task

Cancel Add

Click Add

**Tasks to include in the journey** Enter the below information

Select a task from the library instead

Task Name Required

Performer Worker

Owner Initiator

Duration

Time Unit

Task Type External URL

Reminder No

Task URL Required

Task Description

Add instructions for this task

☐ Enable comments ☐ Make this task mandatory

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

**New Journey**

Cancel Save

Click Save

**What's this journey about?**  
Select an existing journey instead

Display Name New Journey

Category Required

Description

Add a journey title

**Background image for this journey**

+ Add

**Tasks in this journey**

+ Add Task

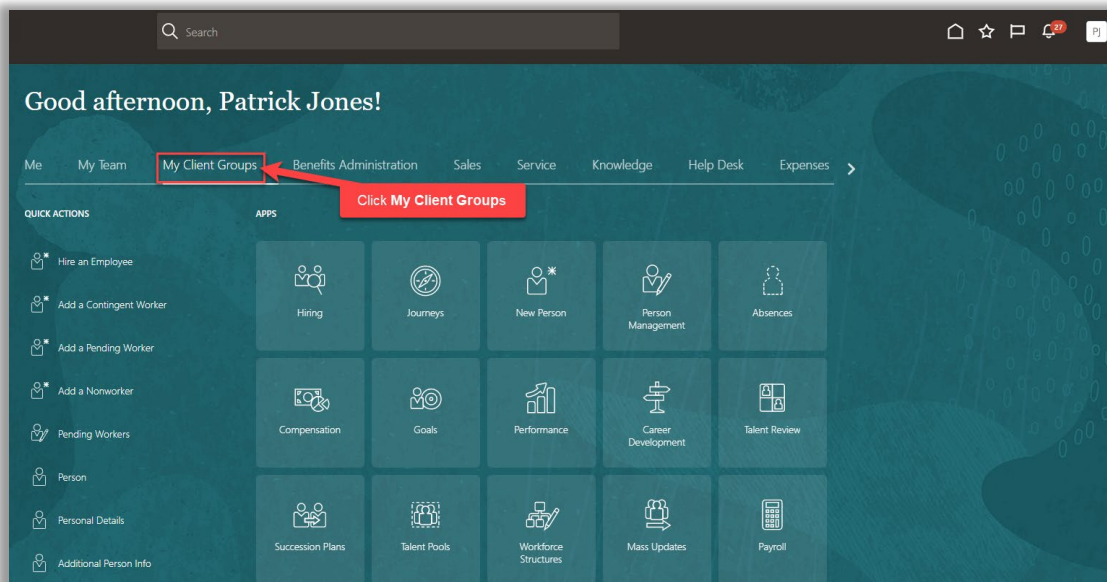
Duplicate of Welcome notice(NYC)

Performer Worker

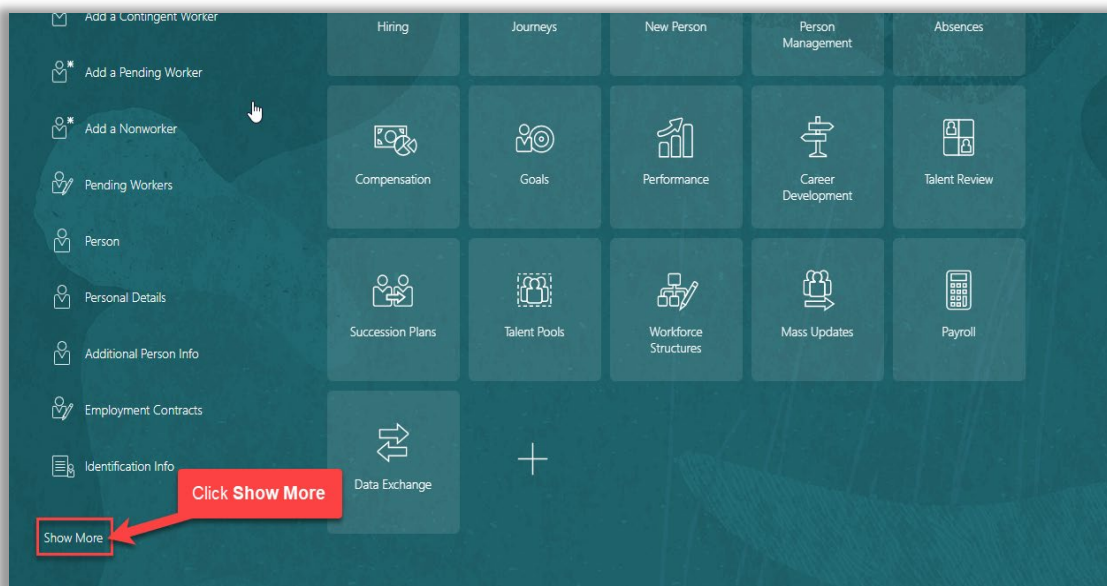
## Create A Task

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

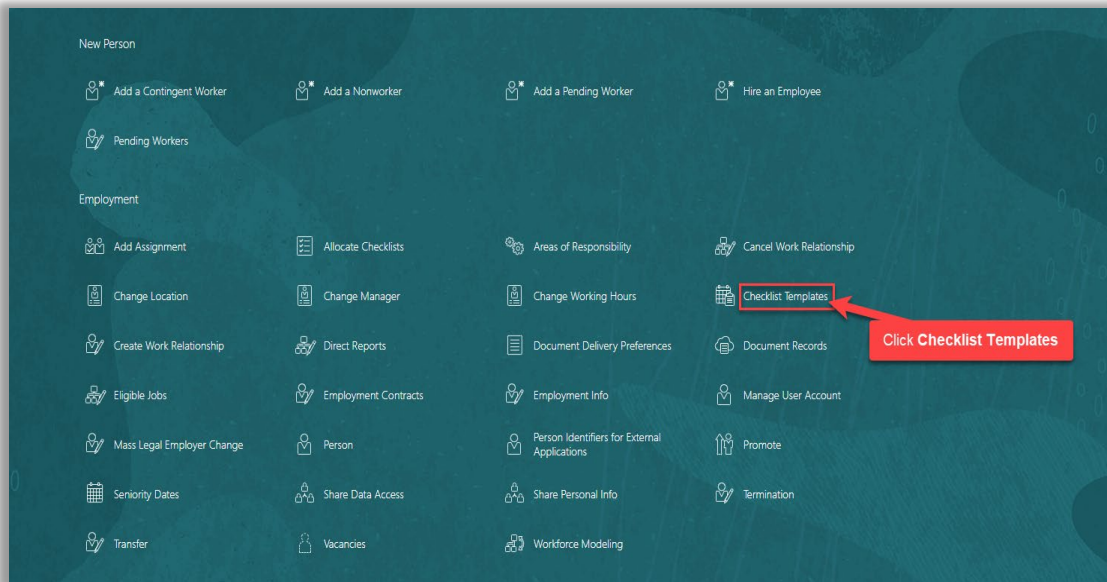
From the home screen, click **My Client Groups**



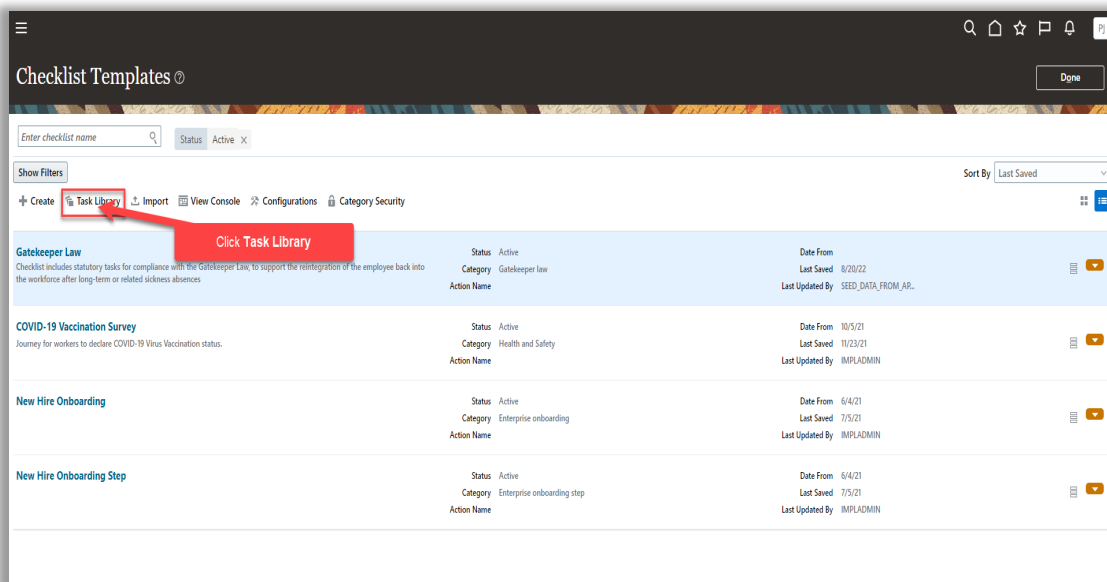
Scroll down and Click **Show More** from the quick actions



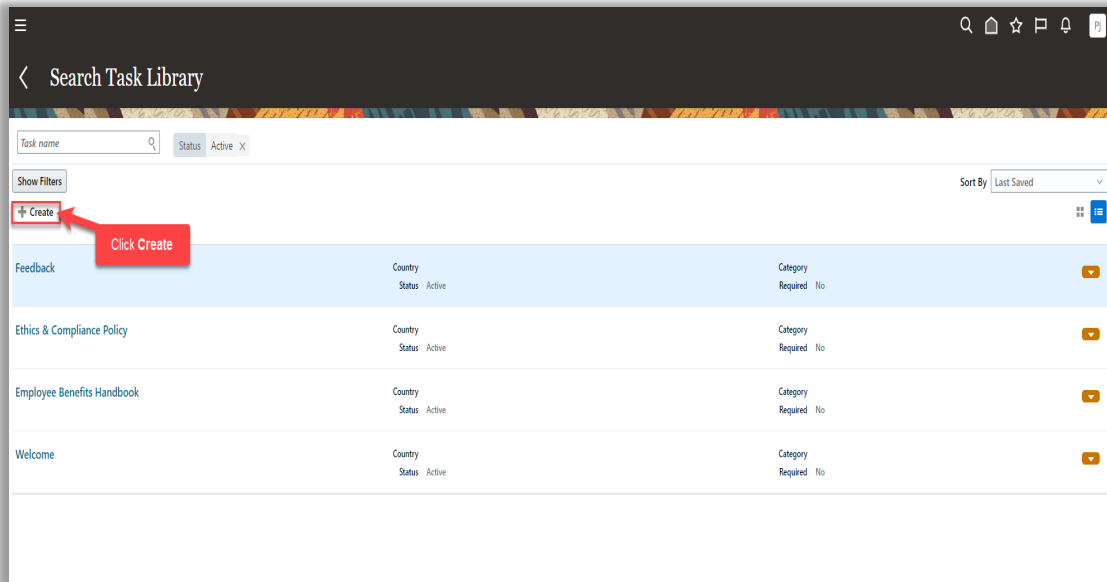
Under Employment, click **Checklist Templates**



Click Task Library

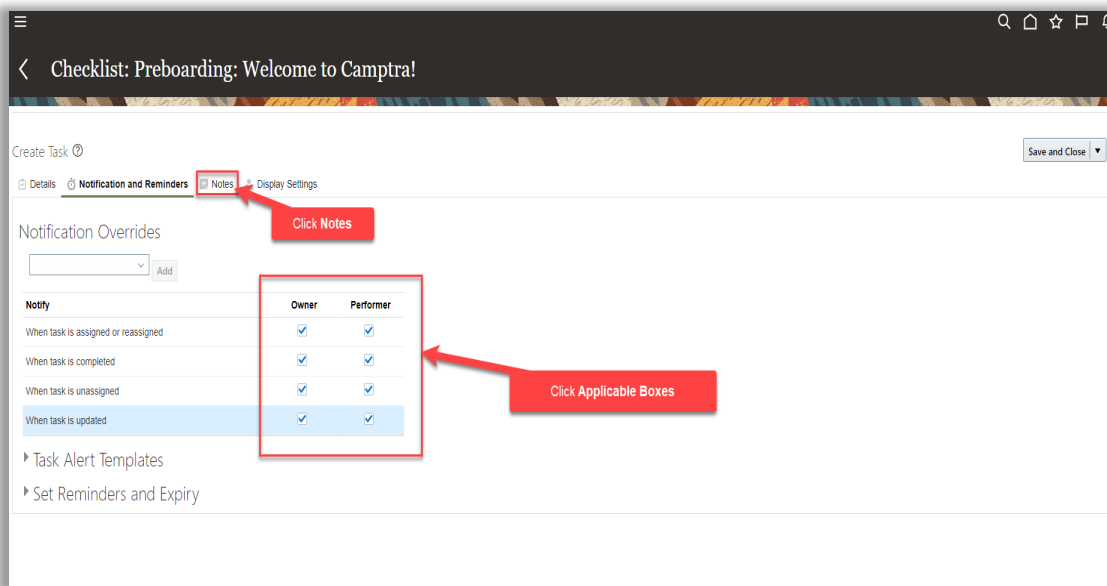


Click Create

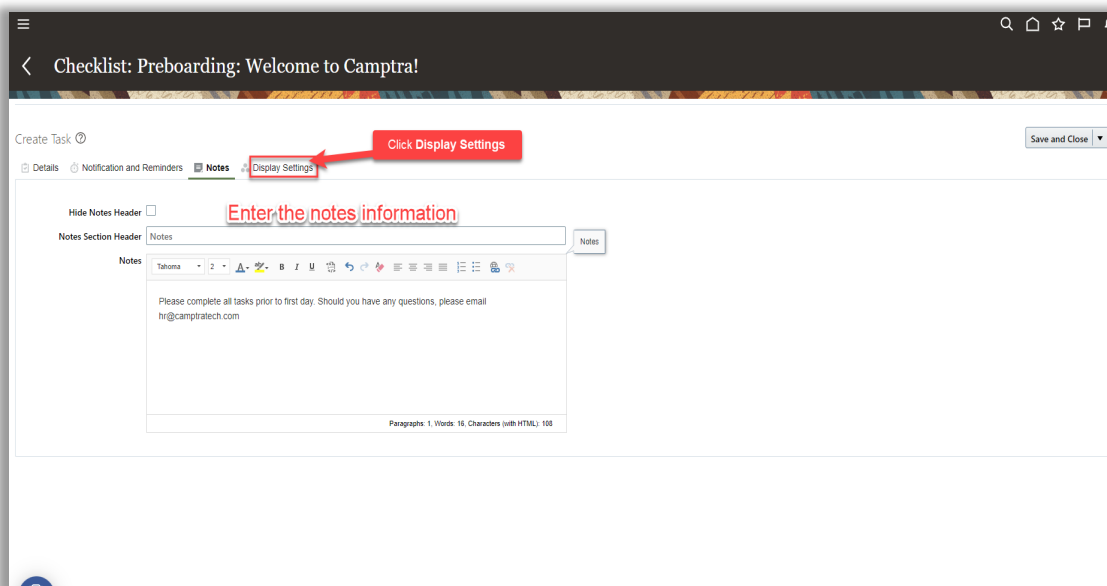


Enter the required information in the **Details** tab for the **Task** then click the tab **Notification and Reminders**

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**



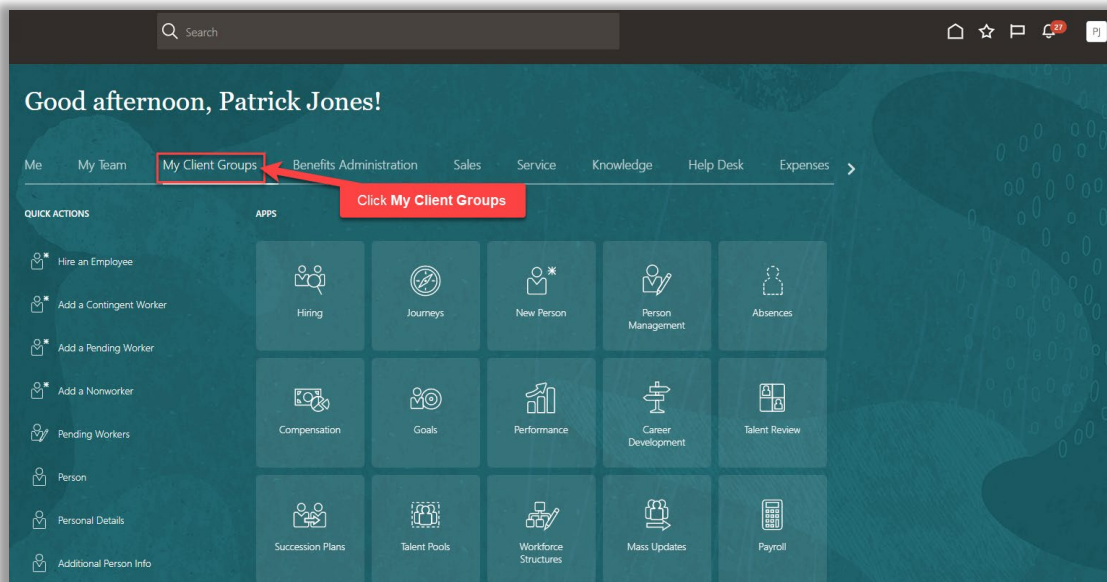
Update the **Display Settings**, if applicable and click **Save and Close**

## Manage Tasks

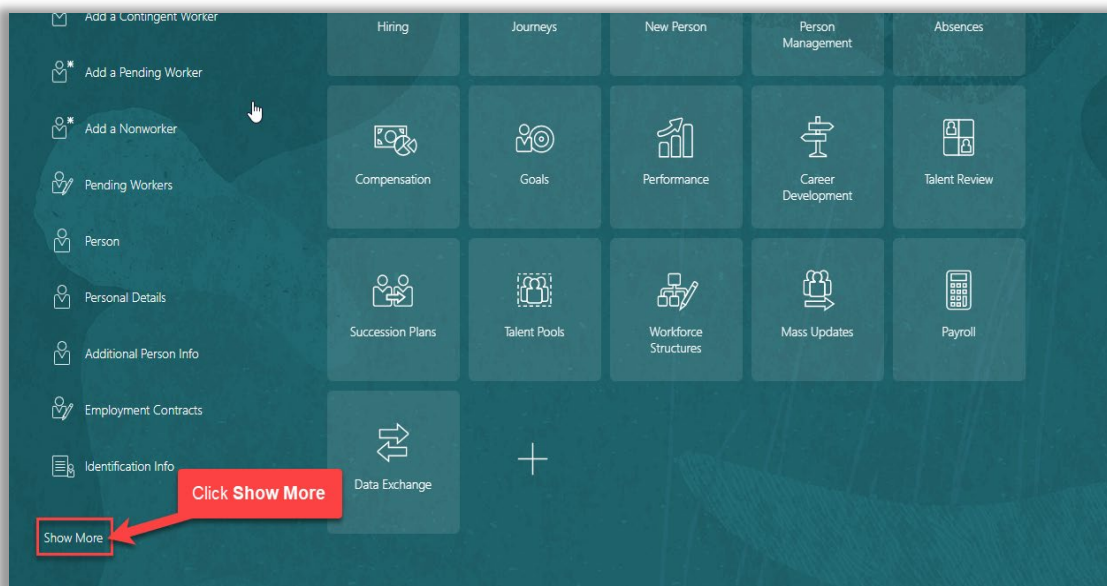
Navigation: Home>My Client Groups>Quick Actions>Checklist Templates>Task Library>Select Task>Update>Submit

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

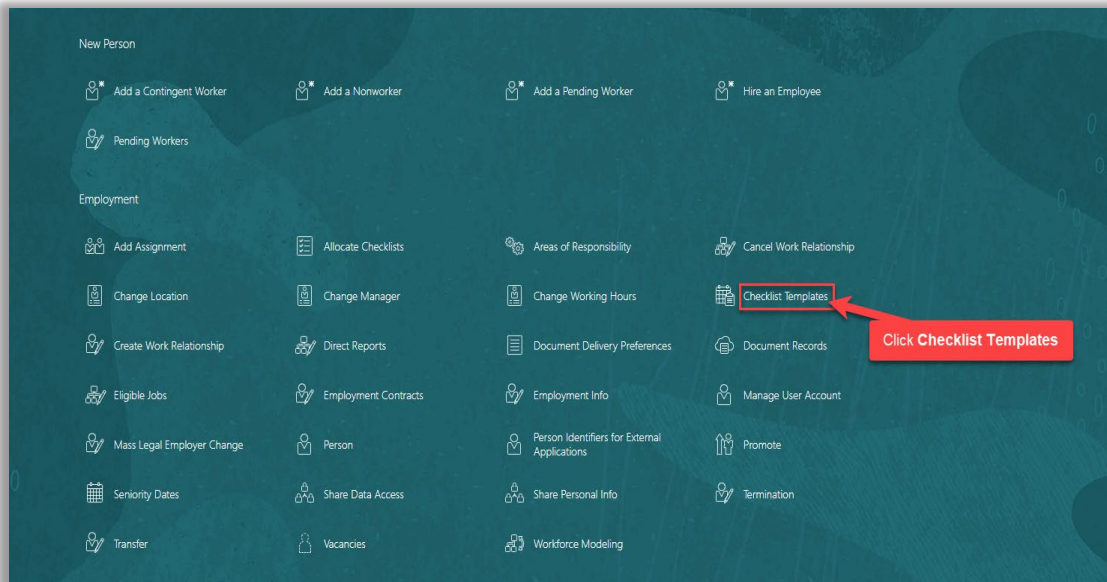




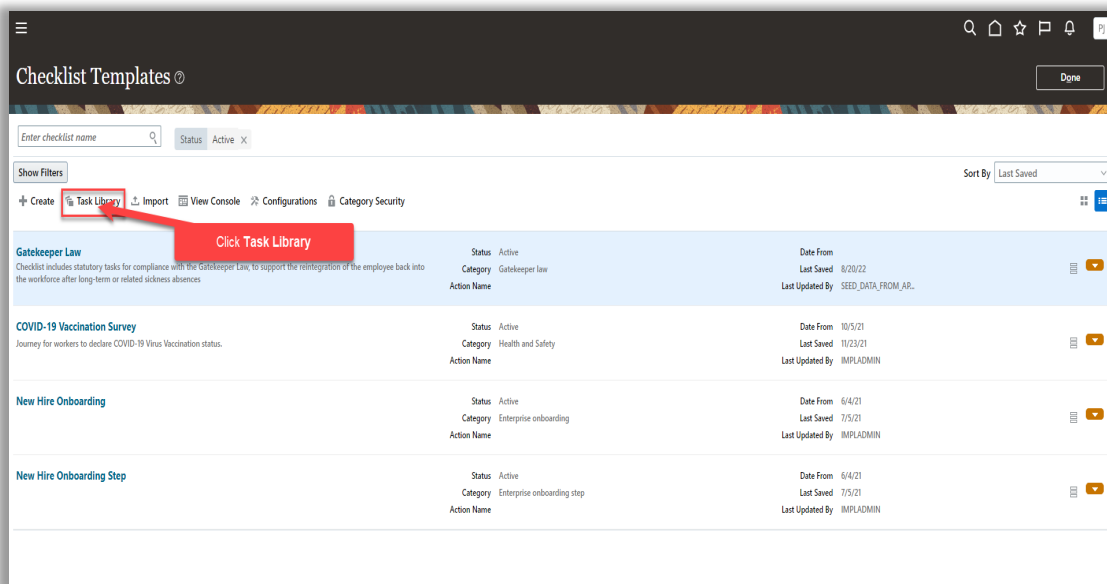
Scroll down and Click **Show More** from the quick actions



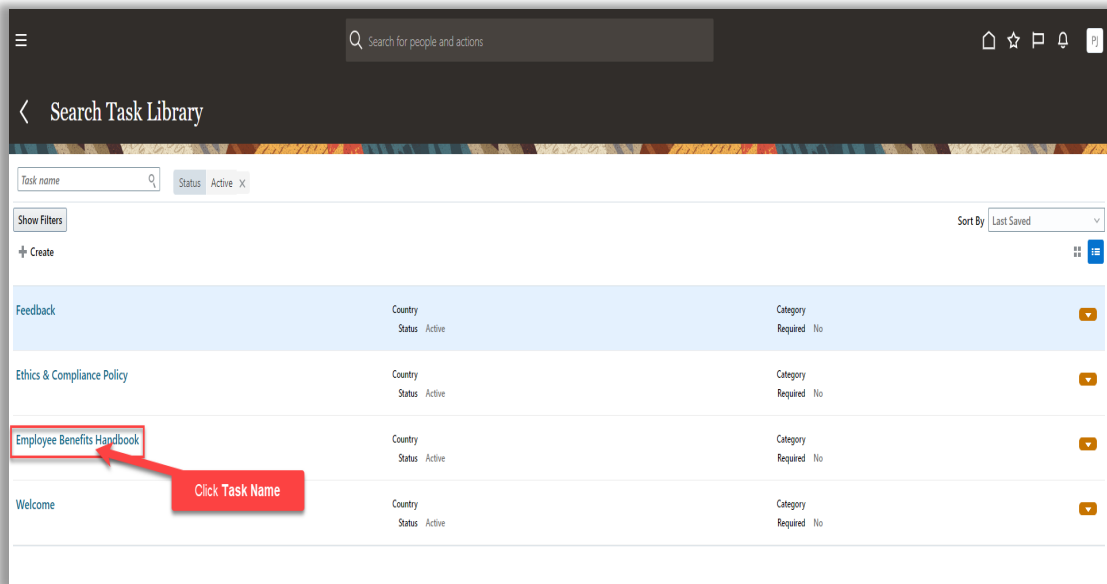
Under Employment, click **Checklist Templates**



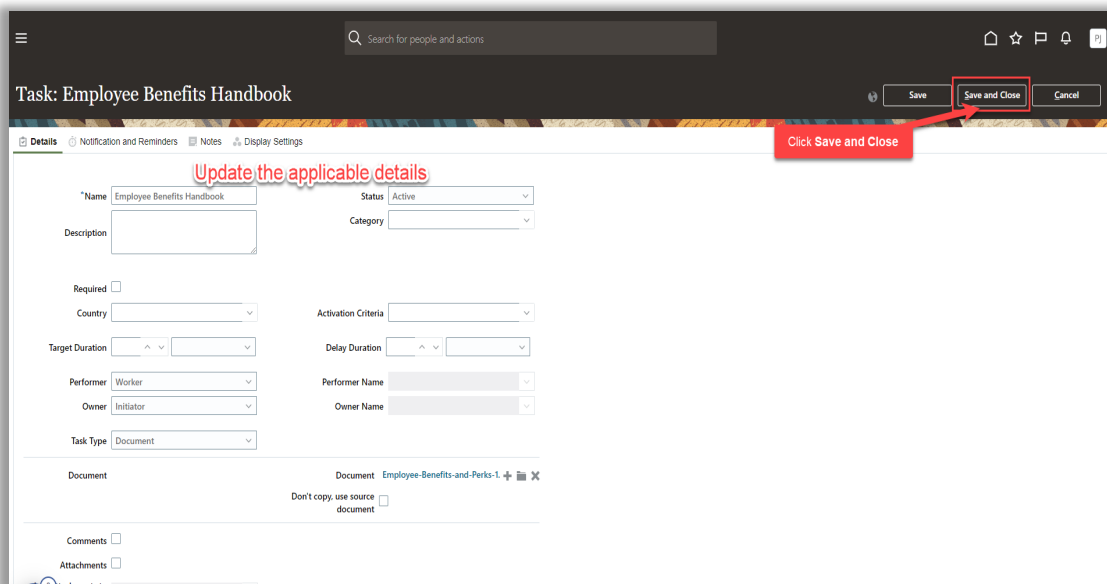
Click **Task Library**



Click **Task Name** to update the details



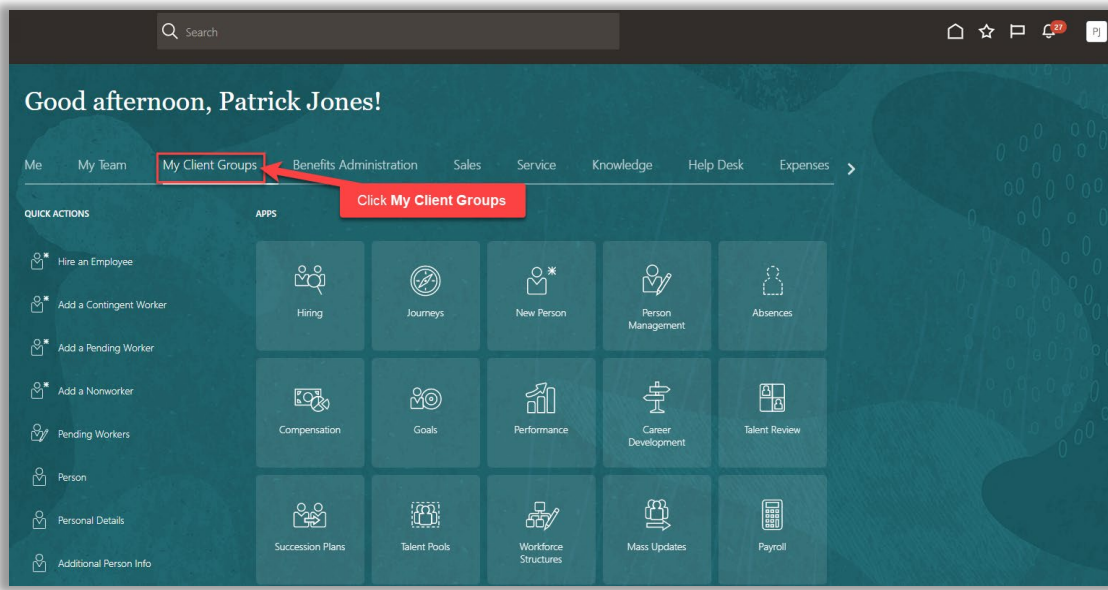
Update the applicable details and click **Save and Close**



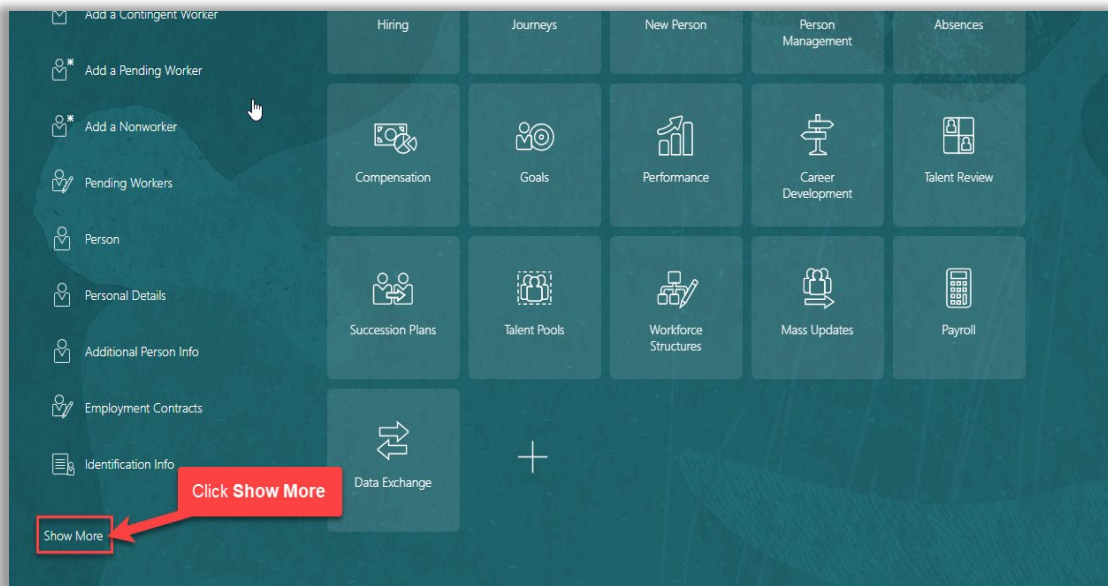
## Manage Journeys

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

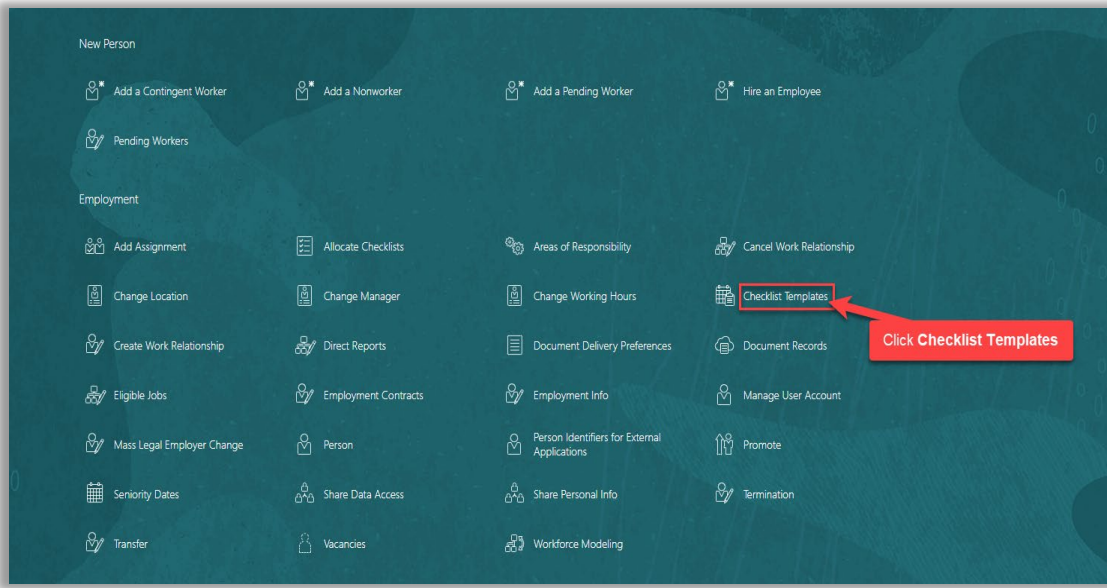
From the home screen, click **My Client Groups**



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



Under Employment, click **Checklist Templates**



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

Checklist Templates ⓘ				Done
	Action Name	Last Updated By CURTIS.FEITY		
<b>Performance</b> Guided Journey for Performance Management	Status	Active	Date From 1/1/21	⋮ ▼
	Category	Guided Journey	Last Saved 5/12/22	
	Action Name		Last Updated By CURTIS.FEITY	
<b>Feedback</b> Guided Journey for Request Feedback	Status	Active	Date From 1/1/21	⋮ ▼
	Category	Guided Journey	Last Saved 5/12/22	
	Action Name		Last Updated By CURTIS.FEITY	
<b>Development Interview</b>	Status	Active	Date From 1/1/22	⋮ ▼
	Category	Talent Management	Last Saved 5/11/22	
	Action Name		Last Updated By CURTIS.FEITY	
<b>Annual Evaluation</b>	Status	Active	Date From 10/18/21	⋮ ▼
	Category	Talent Management	Last Saved 5/11/22	
	Action Name		Last Updated By CURTIS.FEITY	
<b>Update Bank Account Details</b> Complete bank account details	Status	Active	Date From 1/1/22	⋮ ▼
	Category	On Boarding	Last Saved 5/11/22	
	Action Name	Hire	Last Updated By CURTIS.FEITY	

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



Checklist: Update Bank Account Details

Save Save and Close

General Tasks Message Dashboard Actions and Events Display Settings Security

Update the applicable details

\*Name Update Bank Account Details Status Active

Checklist Code UPDATE\_BANK\_ACCOUNT\_DETAILS Date From 1/1/22

Description Complete bank account details Date To m/d/yy

Country Spain Eligibility Profile

\*Category On Boarding Archive After Months 12

Action Name Hire Purge After Months 12

Allocation Criteria When the action record becomes effective Days for Initiation 0

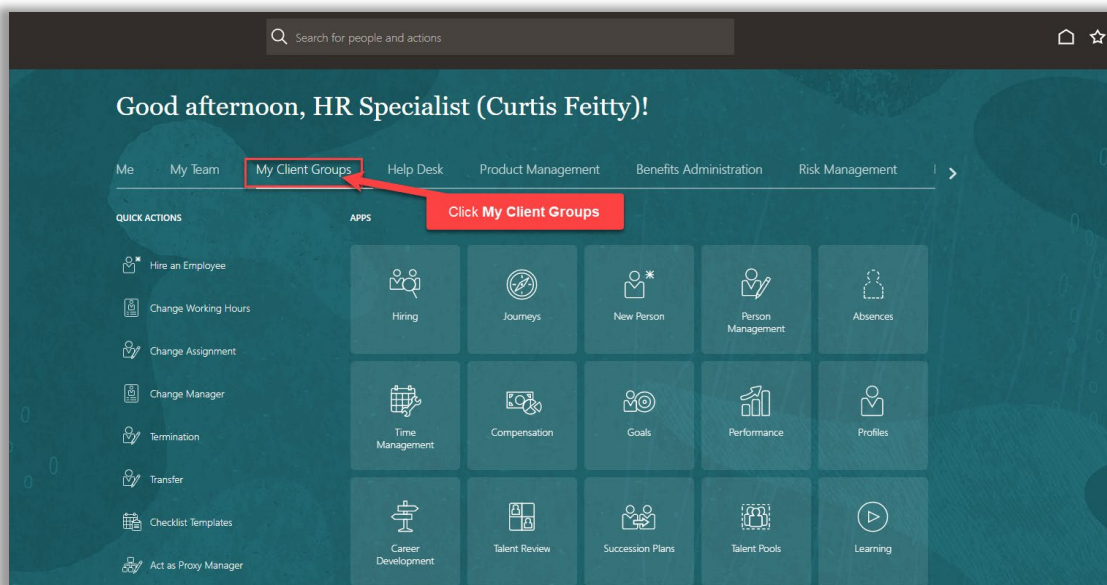
Completion Criteria All mandatory tasks completed Days for Completion 0

Click Save and Close

## Managed An Assigned Journey

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

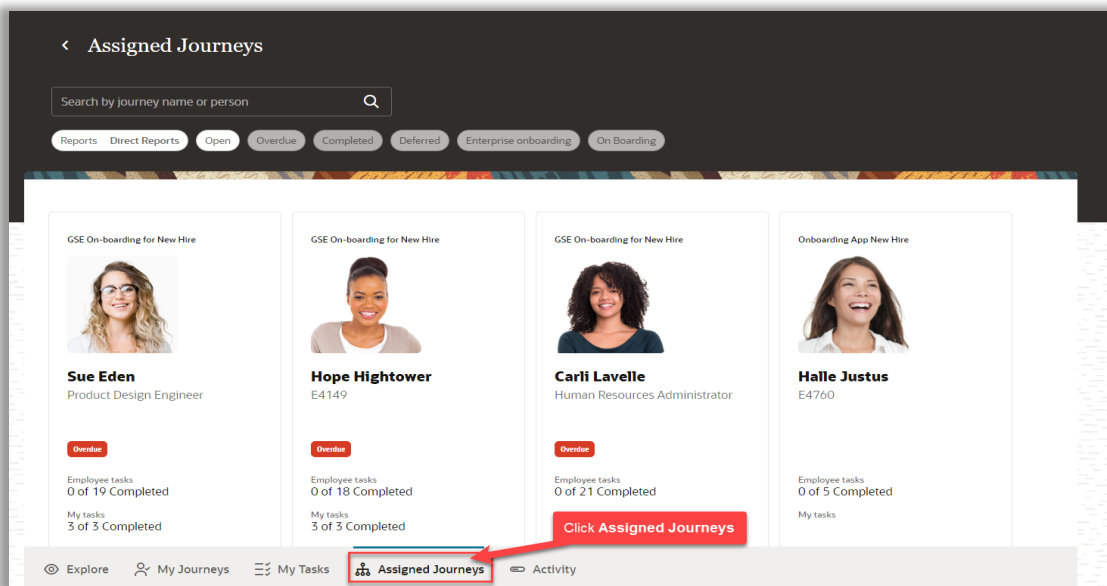
From the home screen, click **My Client Groups**



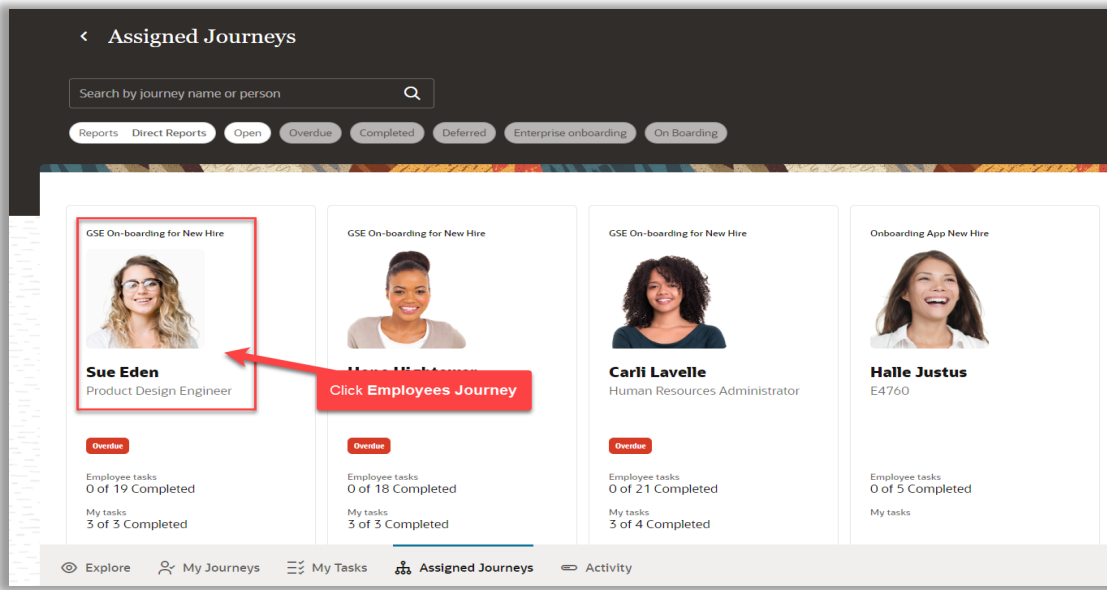
Next, Click **Journeys**



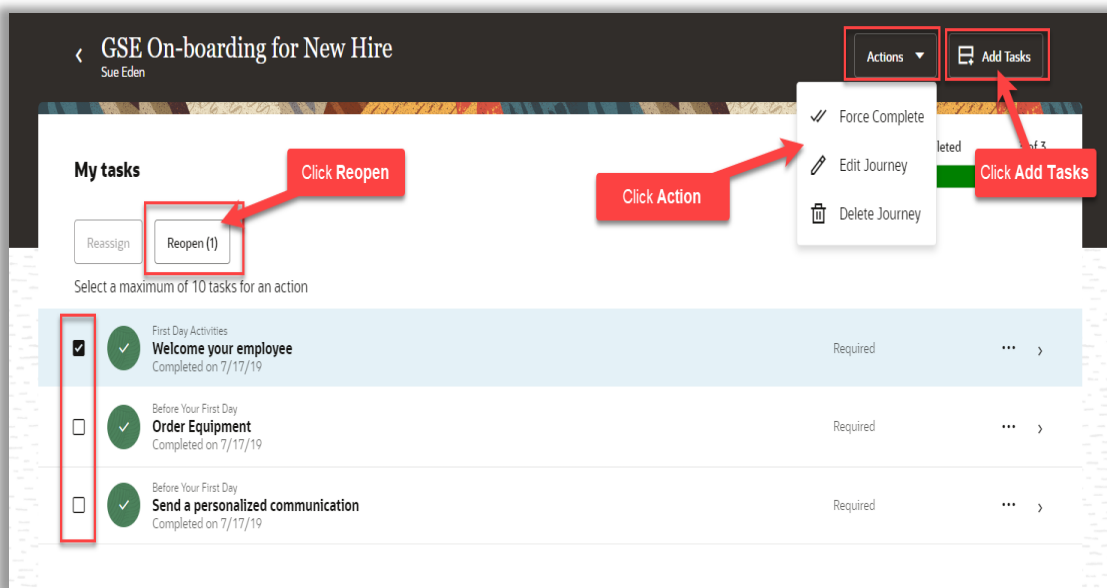
To manage an Assigned Journey, click **Assigned Journeys**



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

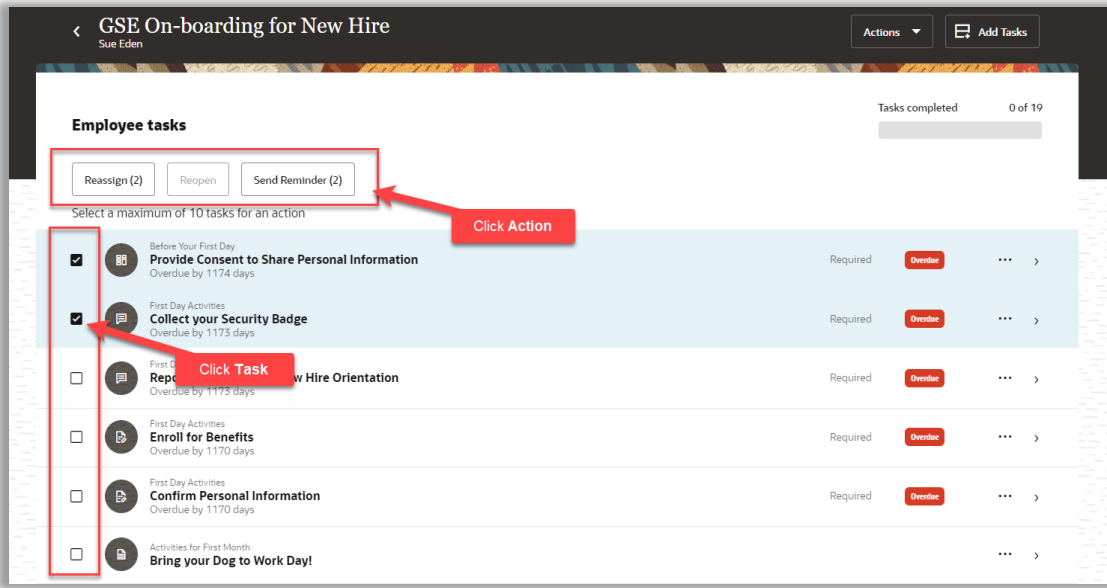


Select the task under **My Task** to **Reopen** the task, Click **Add Task** to add a Task to the Journey or **Actions** to **Complete**, **Edit**, or **Delete** the Journey

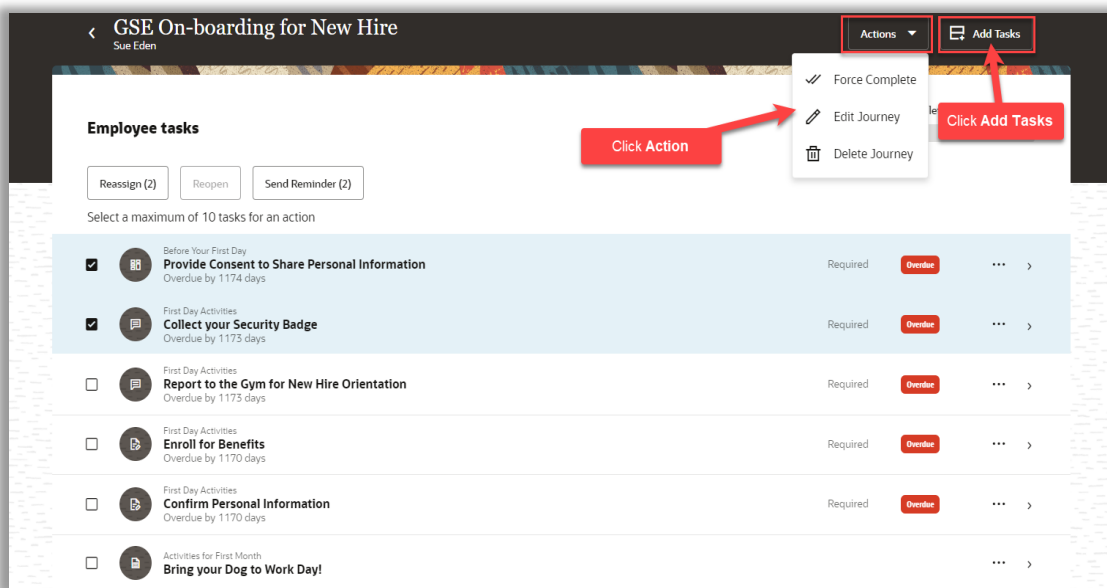


To manage the **Employee Tasks**, scroll down under **Employee Tasks**. Here we can select the tasks to **Reassign**, **Reopen**, or **Send Reminder**





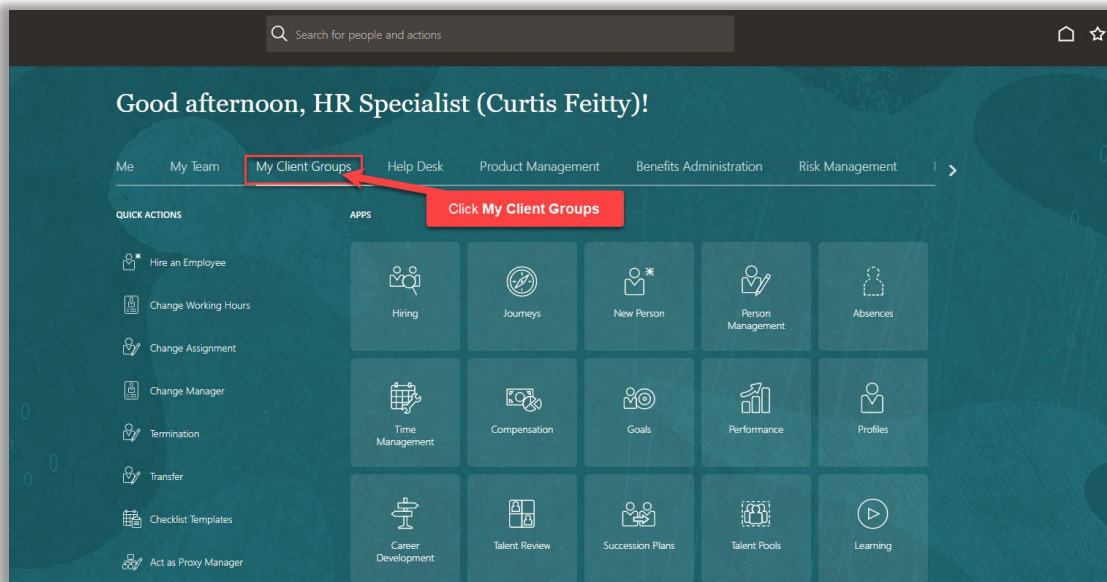
Additionally, we can **Add Tasks**, click **Actions** to **Force Complete**, **Edit Journey**, and **Delete Journey**



## Assign An Existing Journey

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

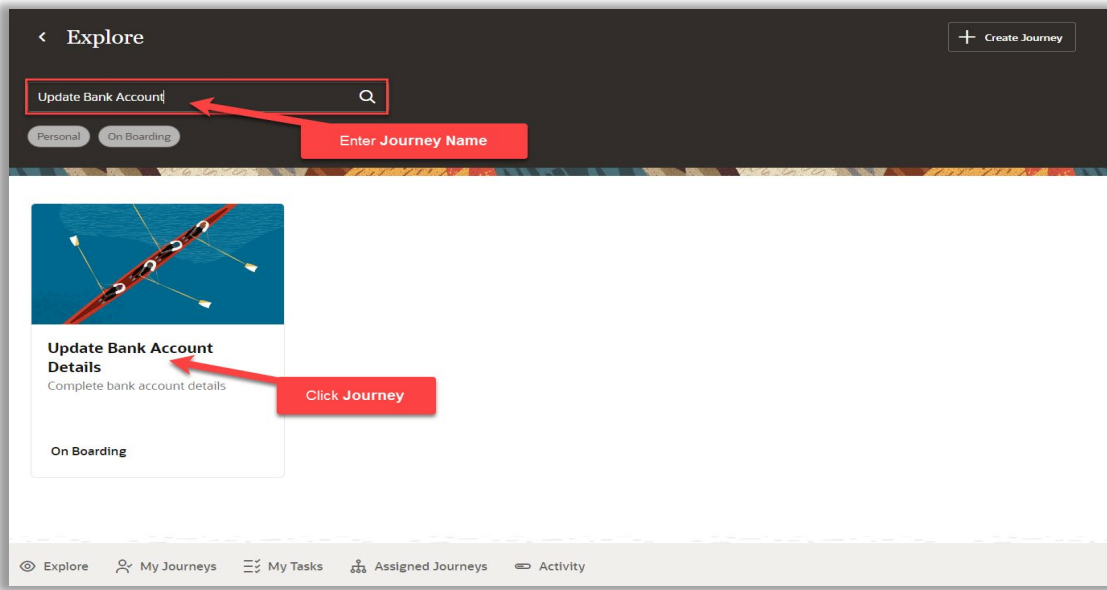
From the home screen, click **My Client Groups**



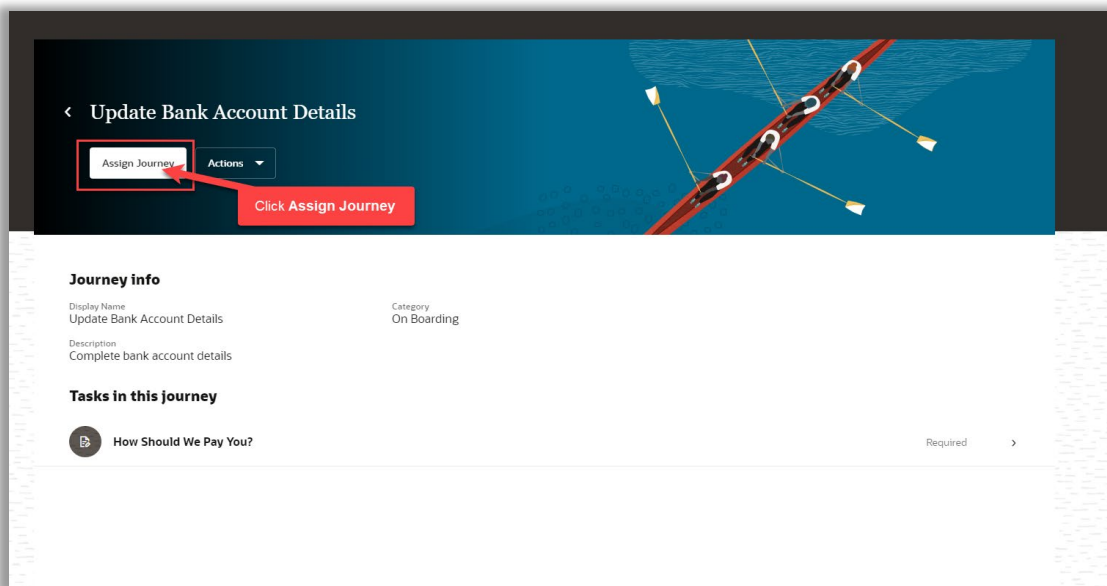
Next, Click **Journeys**



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**

**Update Bank Account Details**  
Assign Journey

When to assign journey?  
9/27/22

Comments

**Whom is this journey for?**

Selection Type  
Person

Select a Person  
Frank

Select Employee

Enter Employees Name

Cancel Assign

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

**Update Bank Account Details**  
Assign Journey

When to assign journey?  
9/27/22

Comments

**Whom is this journey for?**

Frank Arena  
Human Resources Administrator  
frank.arena\_etar-dev1@oraclep demos.com

+ Add Assignee

Click Assign

Cancel Assign

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](mailto:learn@camptratech.com)

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