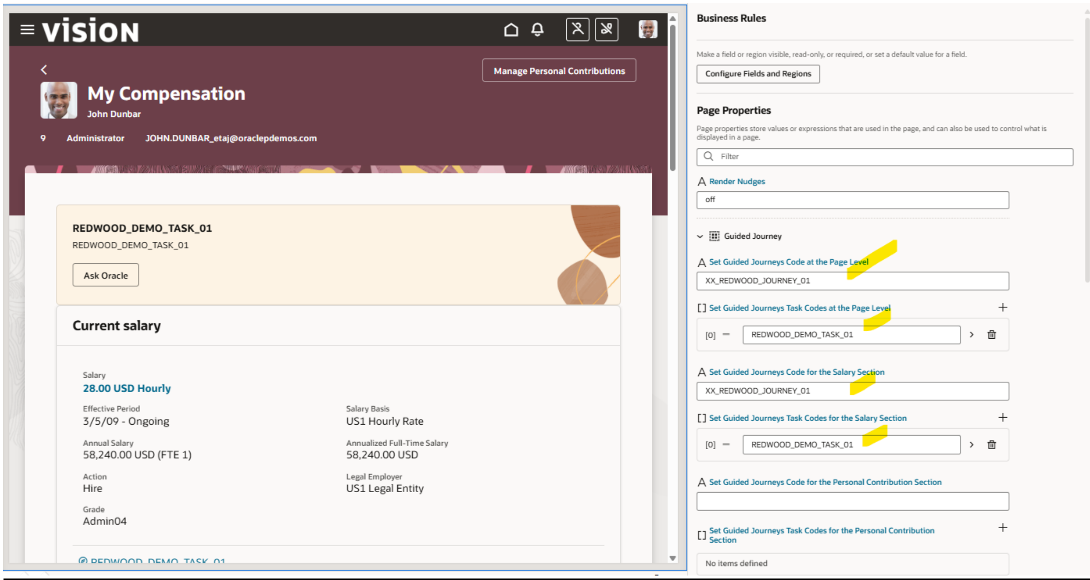
AI Agent Studio demo
Guided Journey+
Basic RAG example AI agent using HCM features
Agent shown on:
Redwood HCM page
Expenses Reports-ADF-Classic. WORKAROUND!

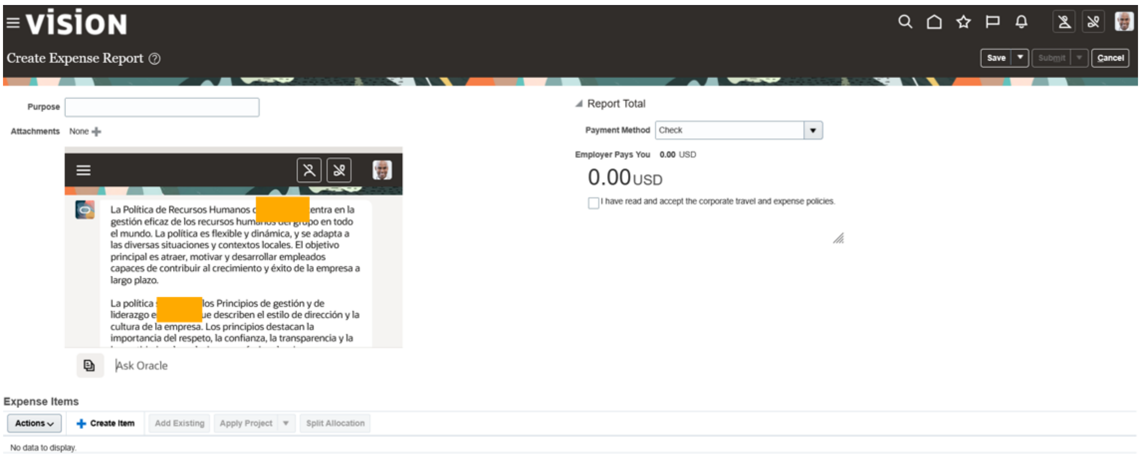
<u>Introduction/Goal.</u>

We are going to create a RAG AI Agent in Fusion, then we will embed the agent in Fusion in these 2 ways:

1) Natural way using Journey Guides in a Redwood page.



2) Using Page Composer to include in Classic-ADF Page. Workaround.



Reference documents.

- https://docs.oracle.com/en/applications/fusion-apps/fusion-procurement/procurement-policy-advisor/index.html#task_three

- https://www.youtube.com/watch?v=yxArtLAiNww

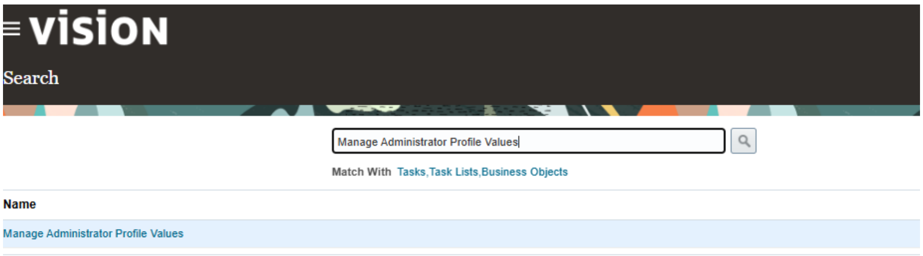
<u>Preparatory steps. Profiles and roles.</u>

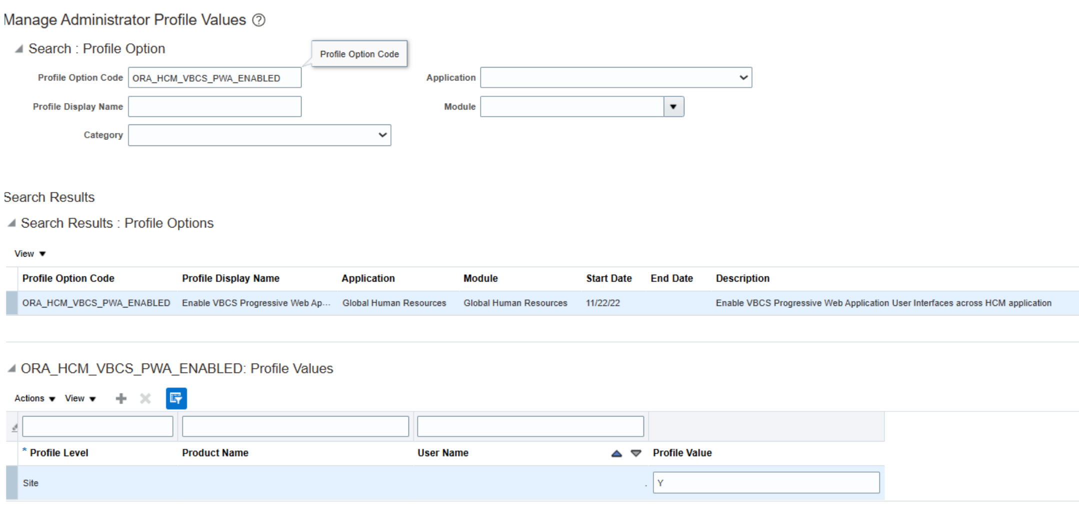
Set profile option values to Y:

- ORA_HCM_VBCS_PWA_ENABLED
- ORA_PER_GUIDED_JOURNEYS_SETUP_REDWOOD_ENABLED
- ORA_PER_AGENT_TASK_TYPE_GUIDED_JOURNEYS_ENABLED
- ORA_PER_JOURNEYS_ENABLED
- ORA_PER_GUIDED_JOURNEYS_ENABLED

This step should be done in SaaS. Menu-Setup and Maintenance.

Search: “Manage Administrator Profile Values”.





Privileges required:

- HRC_MANAGE_AI_AGENT_PRIV (no needed for end users).
- HRC_ACCESS_AI_AGENT_CHAT_PRIV

Privileges should be linked to roles and these roles to the users. In our demo instances this is already done.

After setting up above privileges run Job “Import User and Role Application Security Data”.

Preparatory steps. Create Agent.

1) Tool + Document.

Note: for learning purposes we will use AI HCM to create the Agent.

In SaaS, on the home page, click My Client Groups, then Show More quick actions.

In the Tools section, click Configure HCM Agents, if you cannot access this menu option...

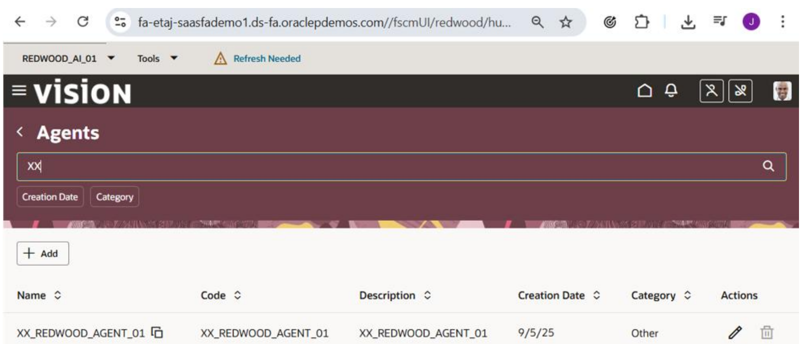
then use this URL.

https://xxxdabpqy.ds-fa.oraclepdemos.com/fscmUI/redwood/human-resources/gen-ai/launch

This is the suffix to add to your POD.

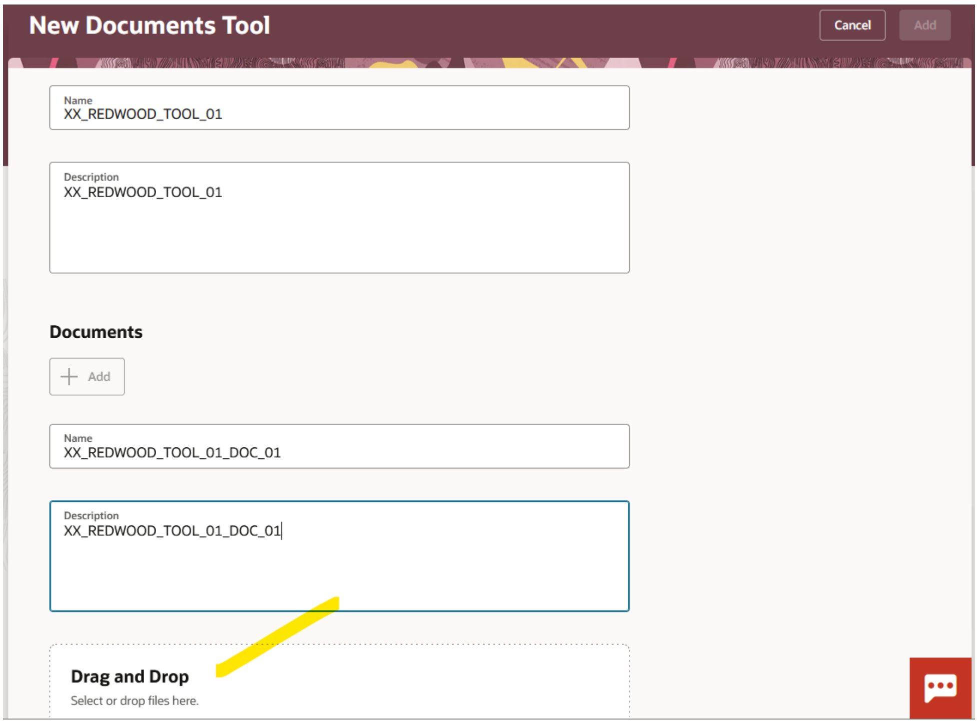
/fscmUI/redwood/human-resources/gen-ai/launch

You will see this page, click on “Tools” tab.



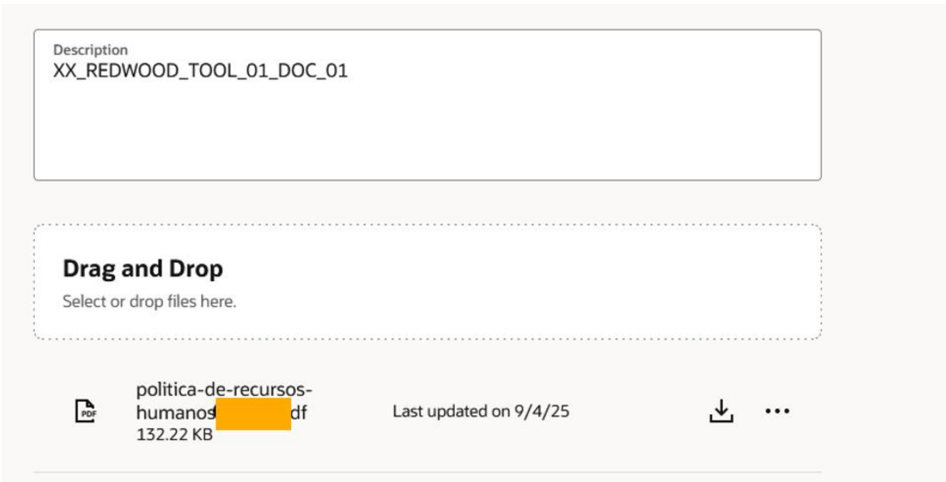
Now click on “Add” button and fill in the page the data.

Name: XX_REDWOOD_TOOL_01.

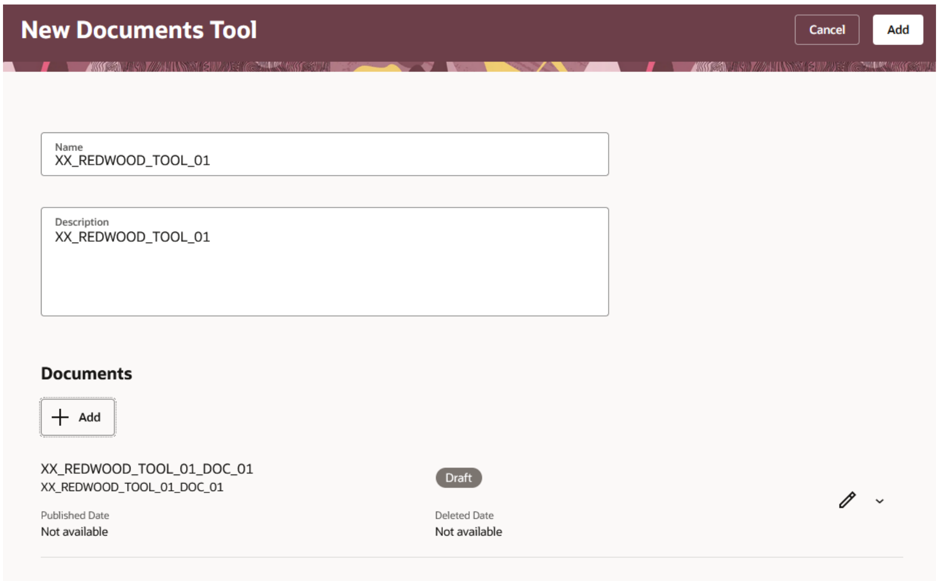


Drag and drop your PDF file with HR policies, technical document, instructions, company rules or similar.

We are playing with PDF documents from internet, nothing special.



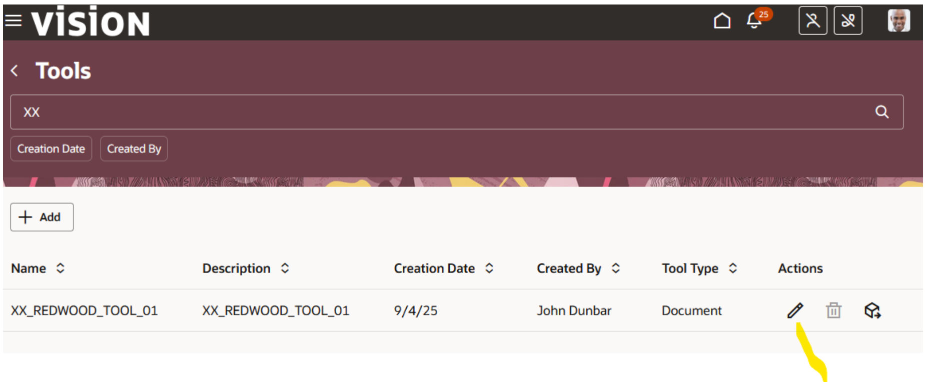
Click on "Save" button and "Add".



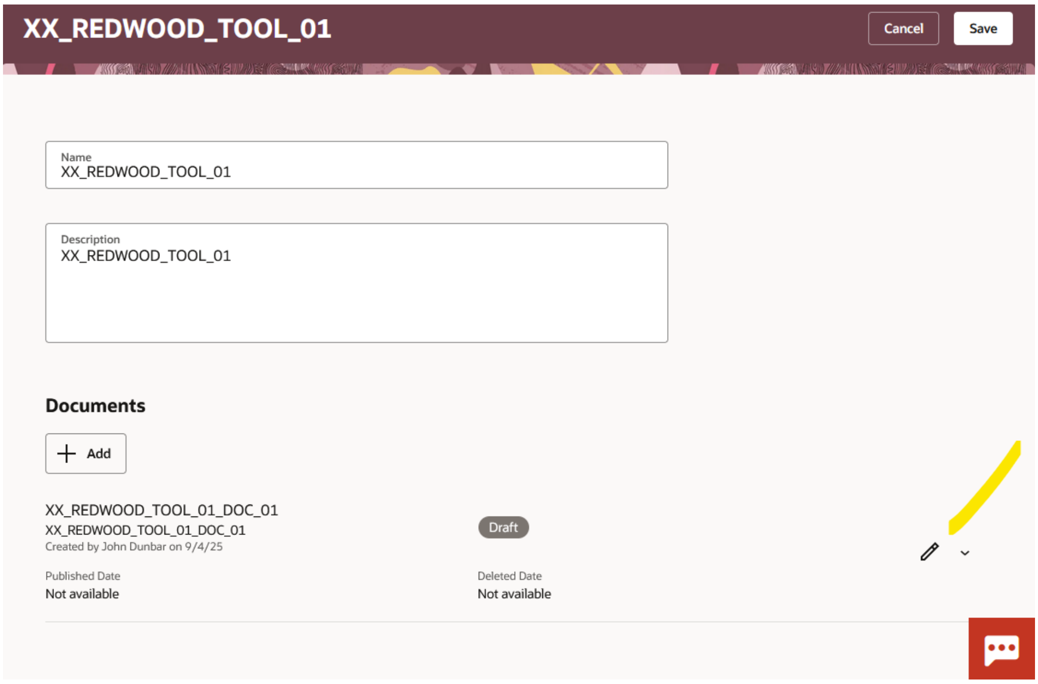
Add as many documents as you need. You will now have a “Draft” document.

In the next steps the document will be “indexed” by Oracle AI tools (scope for this is outside this document). First, re-query the “Tool” that we just created.

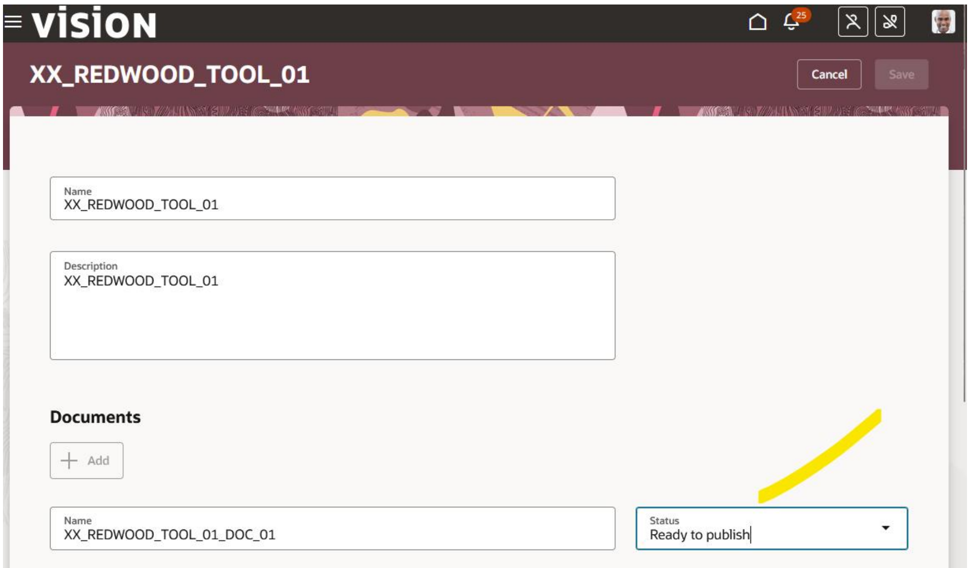
Click “Edit”.



Click “Edit” again.



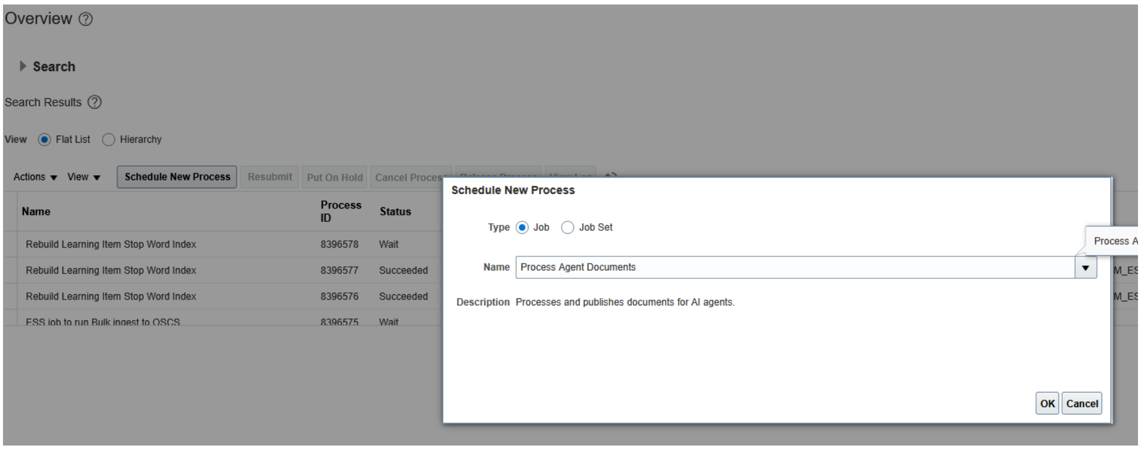
Change here to “Ready to publish”.



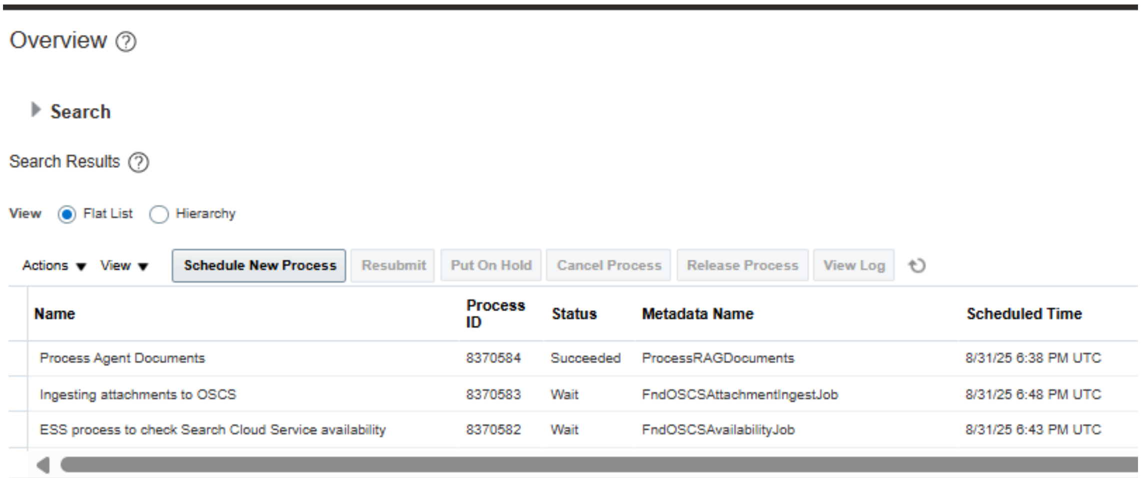
Save (below button) and Save (above button).

For indexing the document run the Job “Process Agent Documents” in Scheduled Processes menu.

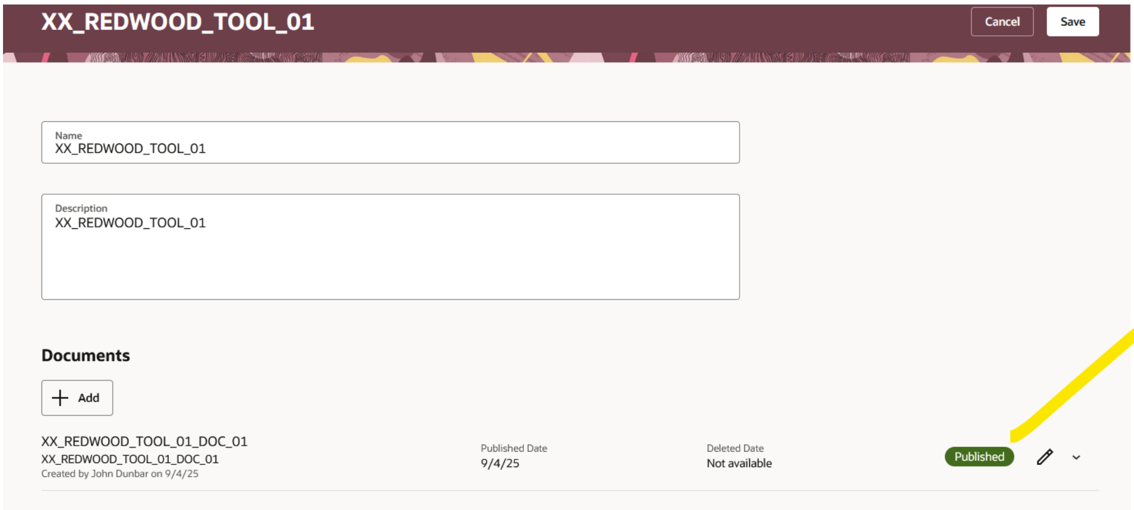
Select the process to run and run it.



Wait to finish.



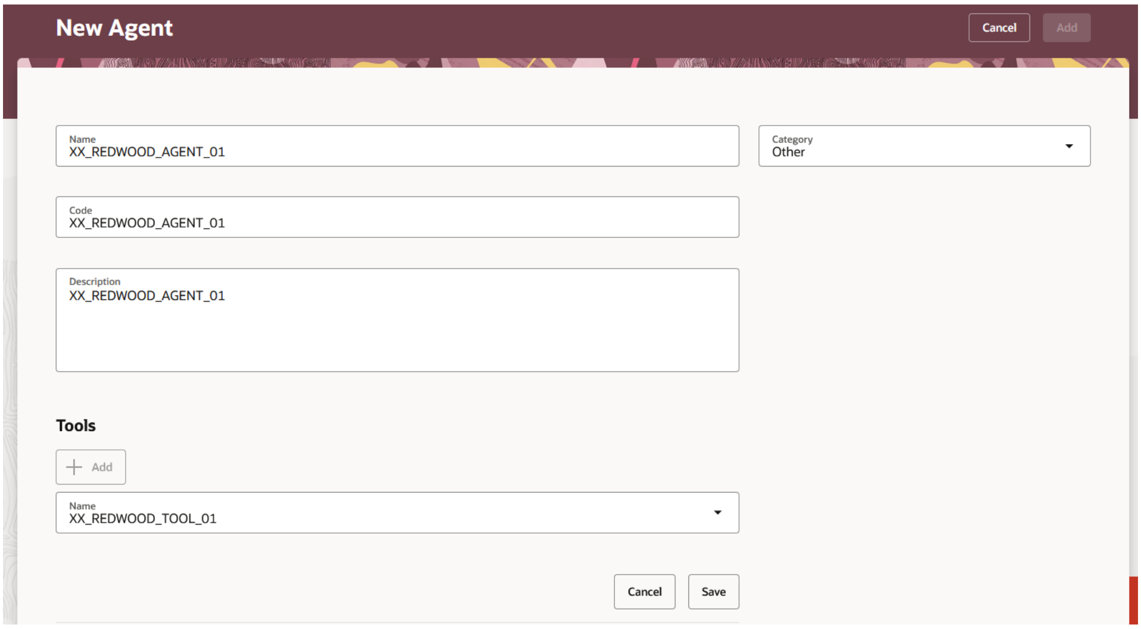
After running job if we re-query we should see the following change.



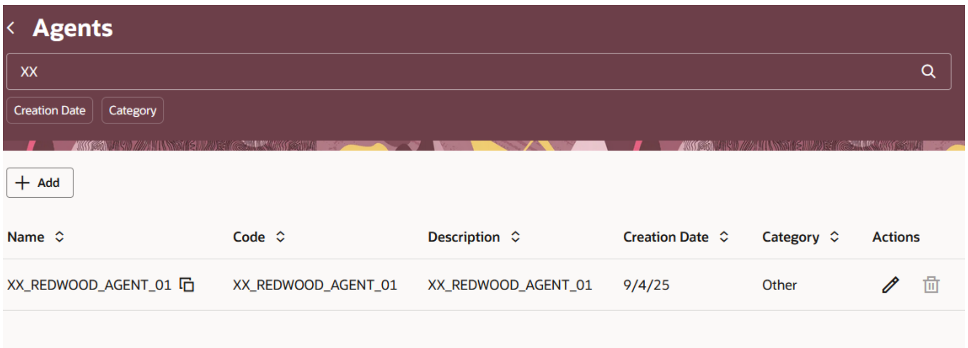
2) Agent.

Now go to “Agents” tab and click on “Add” button. Category “Others”.

Name: XX_REDWOOD_AGENT_01.



Now click “Save” button and “Add” button.

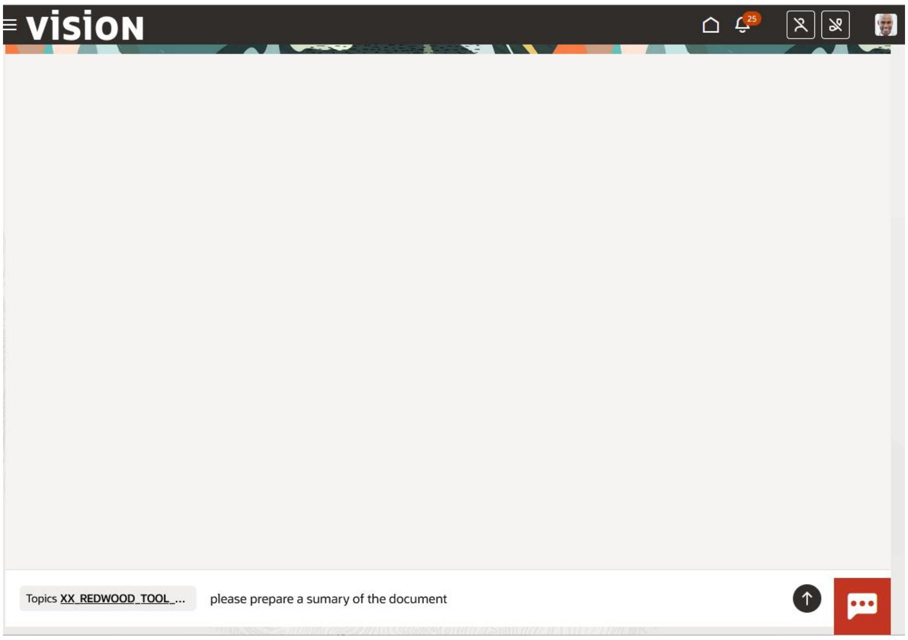


At this point you already can play with a plain URL and test, if you have the proper roles.

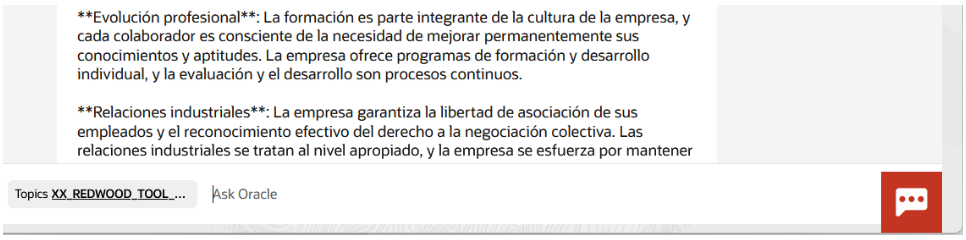
https://fa-zzzz-saasfademo1.ds-fa.oraclepdemos.com:443/fscmUI/redwood/human-resources/chat-agent/launch?agentCode=XX_REDWOOD_AGENT_01

Suffix:

/fscmUI/redwood/human-resources/chat-agent/launch?agentCode=XX_REDWOOD_AGENT_01



This is the answer



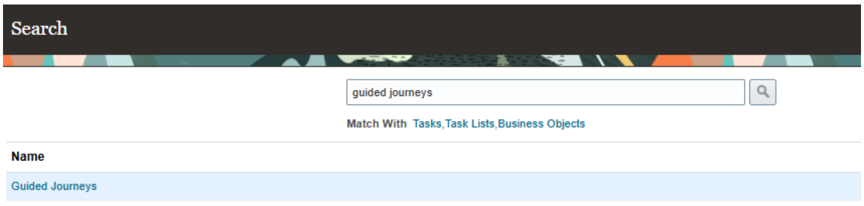
What do we have for now?

An "Agent" with a linked PDF document that can already be queried by employees with Fusion access and proper roles. Below the scenes RAG technology has been applied.

3) Guided Journey.

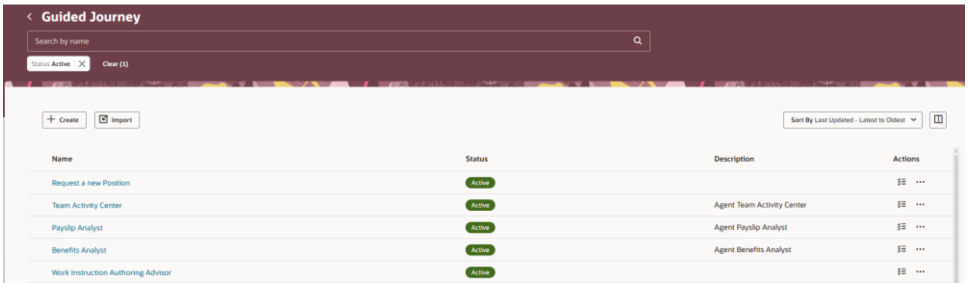
To access, there are more than one path to access the page.

We use this. SaaS menu-Setup and Maintenance and then Search.

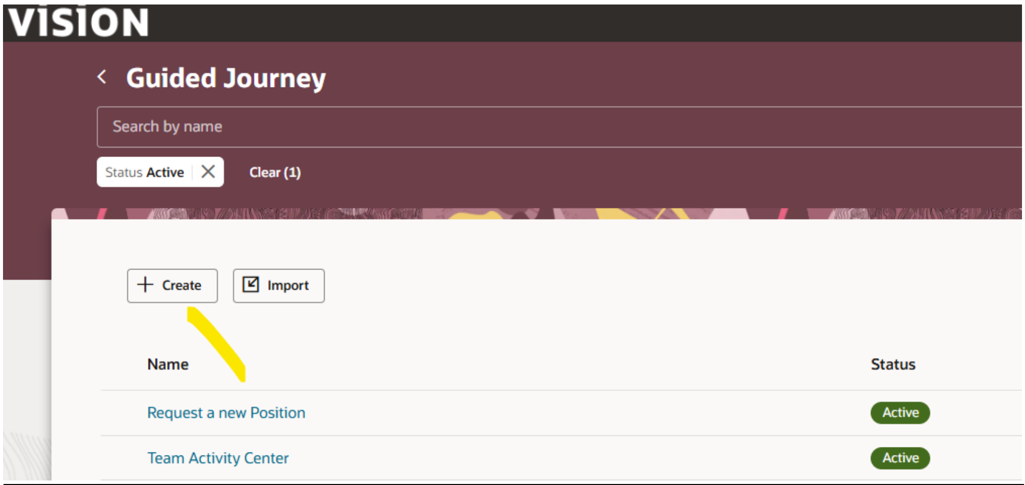


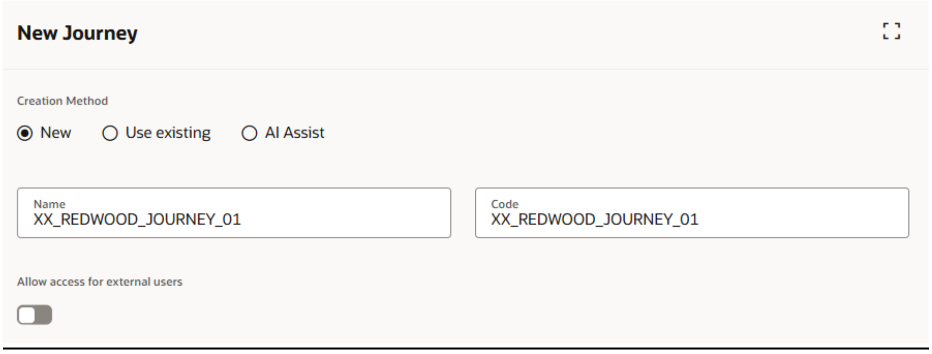
But you can also Navigate from SaaS->Menu->My client groups->

Both navigate to the same page.



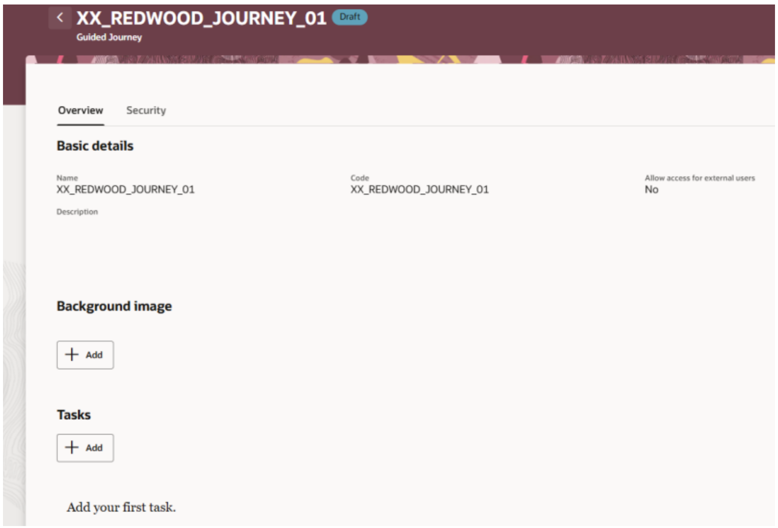
Click on “Create” button.



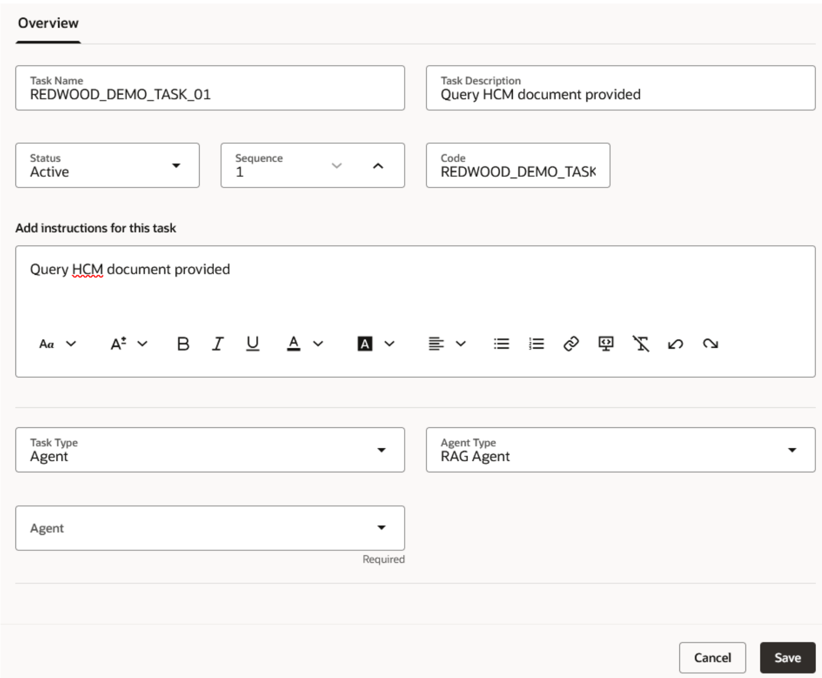


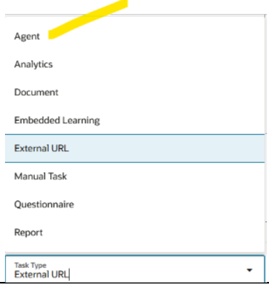
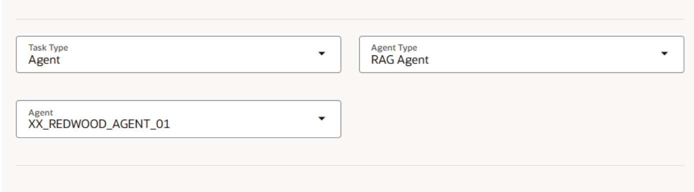
Click on “Create Draft” button (below).

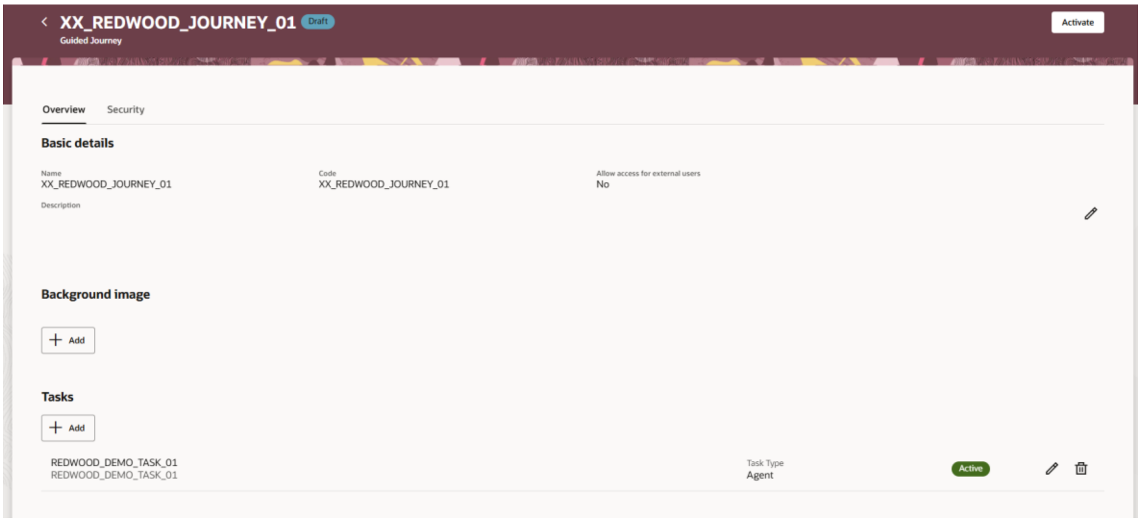
Name: XX_REDWOOD_JOURNEY_01.



Click on “Add” button in Tasks section. Task Name: REDWOOD_DEMO_TASK_01.

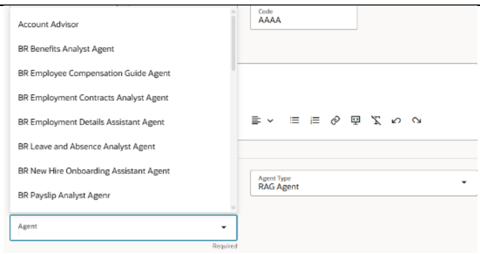
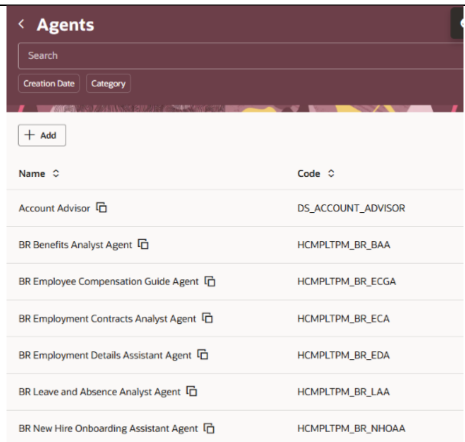


This is the provided list	This is our selection
	

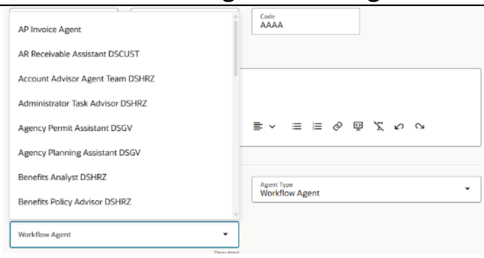
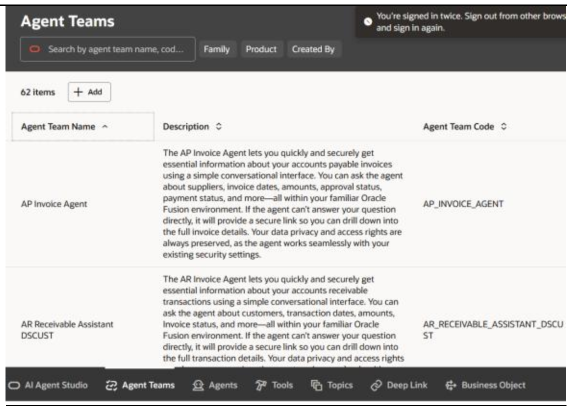


Note.

<table>
<tr><td>Selecting RAG Agent</td><td>The list of values comes from:

https://fa-xxxx-bbbb.ds-fa.oraclepdemos.com//fscmUI/redwood/human-resources/gen-ai/launch</td></tr>
<tr><td>
</td><td>
</td></tr>
<tr><td>Selecting Workflow Agent.

Indeed, the list of values shows “Agent Team” not Agents. See right.</td><td>The list of values comes from:

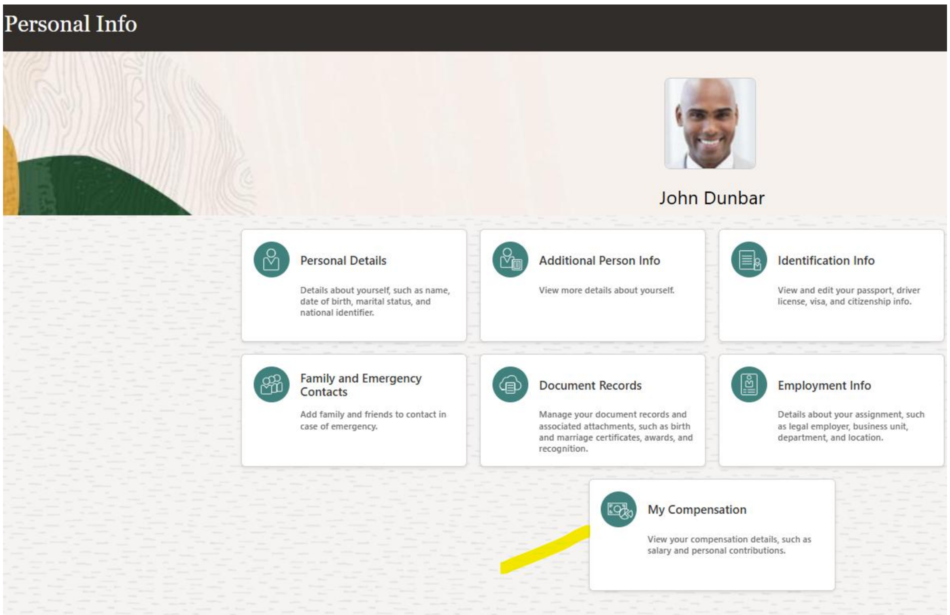
https://fa-zzzz-bbb.ds-fa.oraclepdemos.com/fscmUI/redwood/human-resources/ai-studio/launch</td></tr>
<tr><td>
</td><td>
</td></tr>
</table>

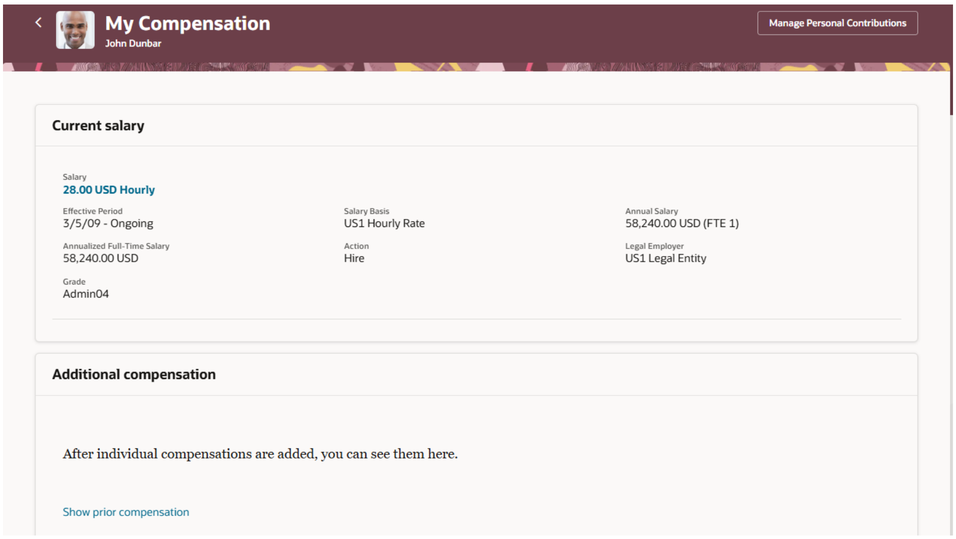
4) Visual Builder Customization.

Your user will need the proper roles to access Visual Builder.

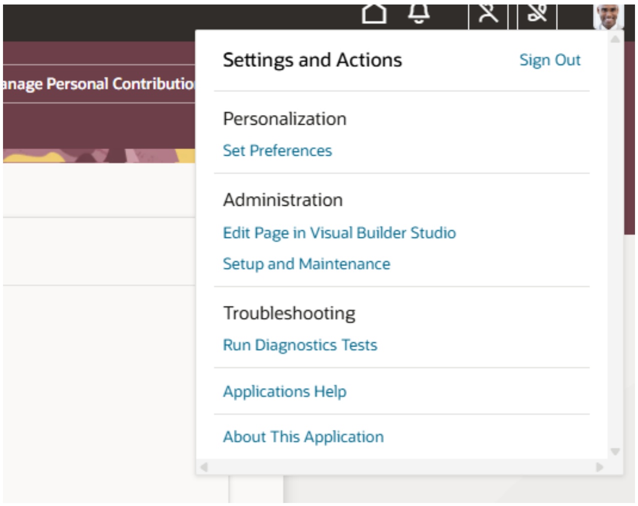
For learning purposes, we will use the “My Compensation” HCM page.

Navigate as follows:

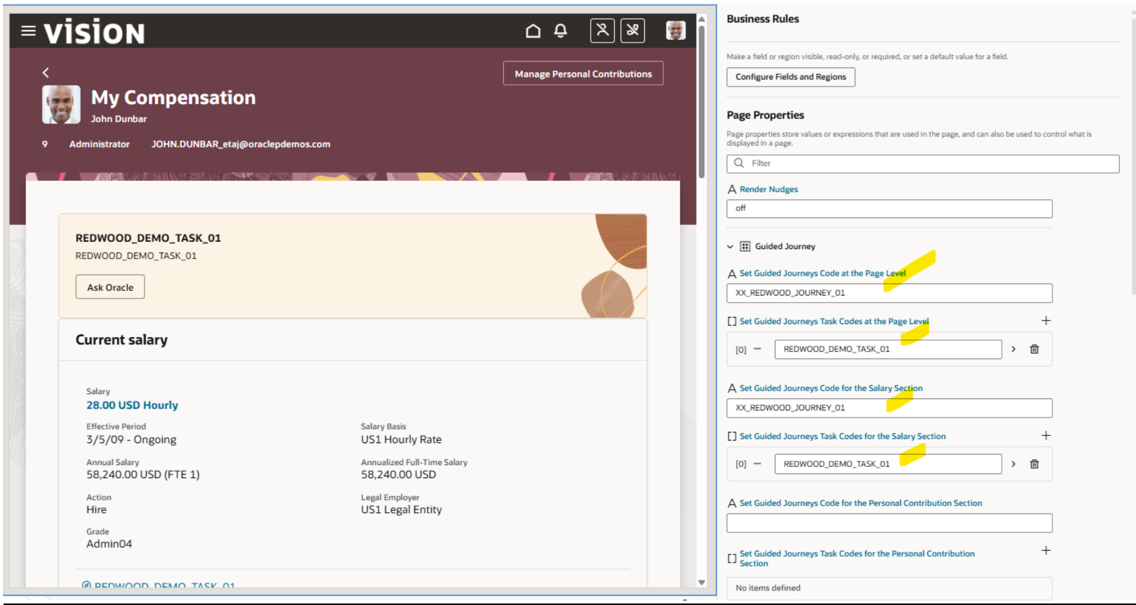




Enter Visual Builder.



Our name is: XX_REDWOOD_JOURNEY_01.



If we Publish our Visual Builder extension, all users will have access to this feature.

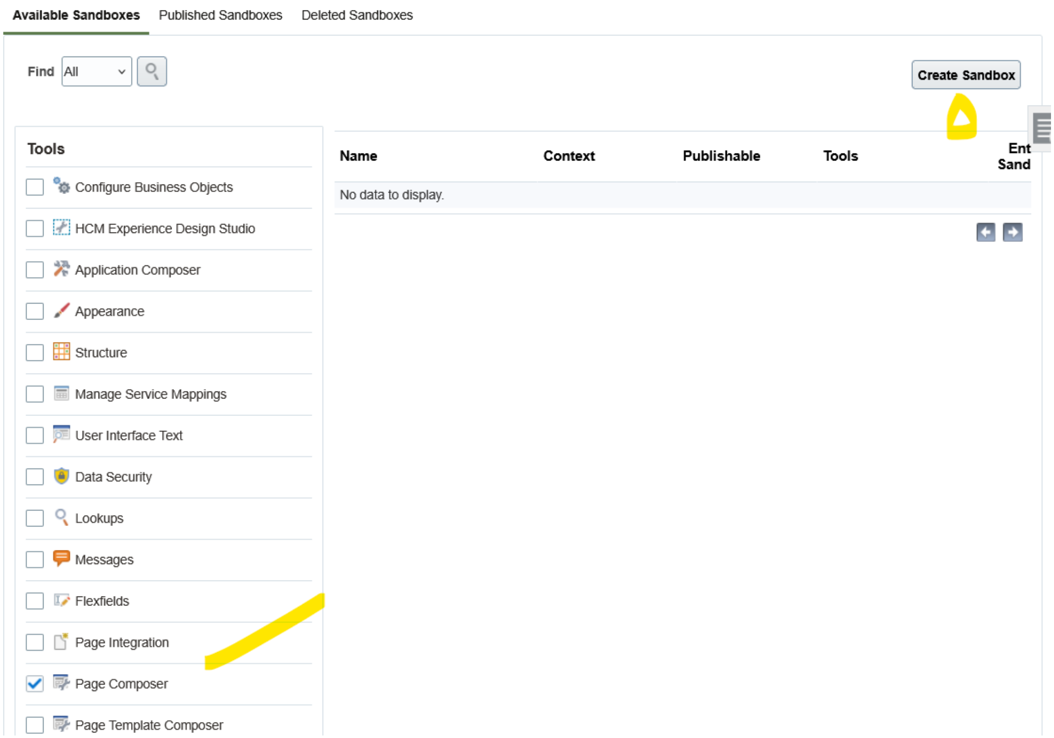
Publish action in VB extensions is outside the scope of this document. Search blogs or review our books related to Redwood.

5) **Customization in Page Composer to embed in ADF-Classic page.**

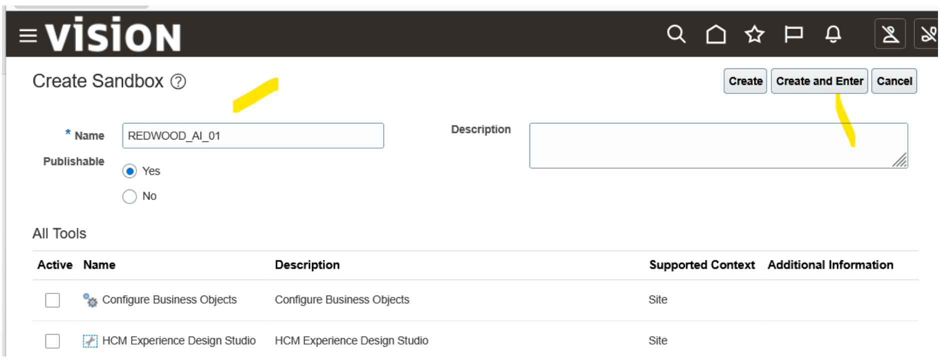
When you have your URL with your agent working you could embed it into the ADF-Classic page and see what happens.

https://fa-zzzz-saasfademo1.ds-fa.oraclepdemos.com:443/fscmUI//redwood/human-resources/chat-agent/launch?agentCode=XX_REDWOOD_AGENT_01

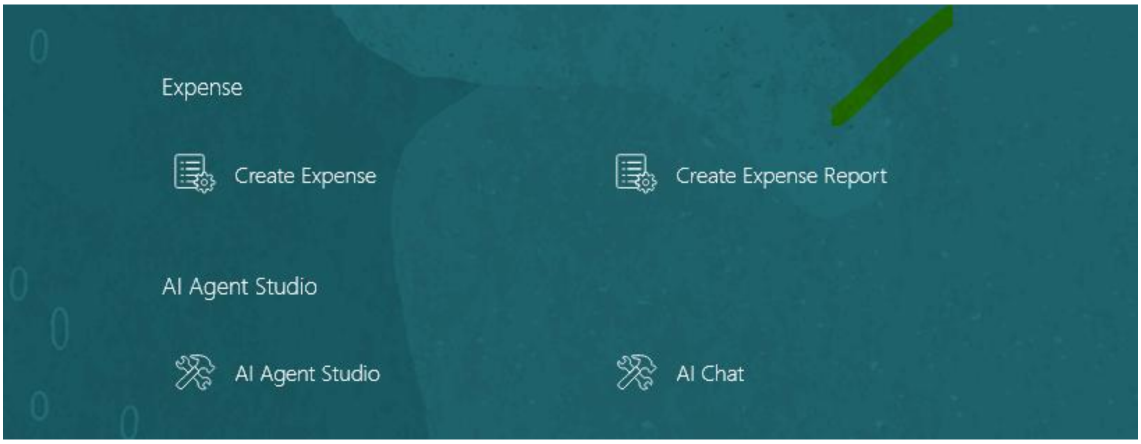
In SaaS, menú-configuration-Sandboxes.



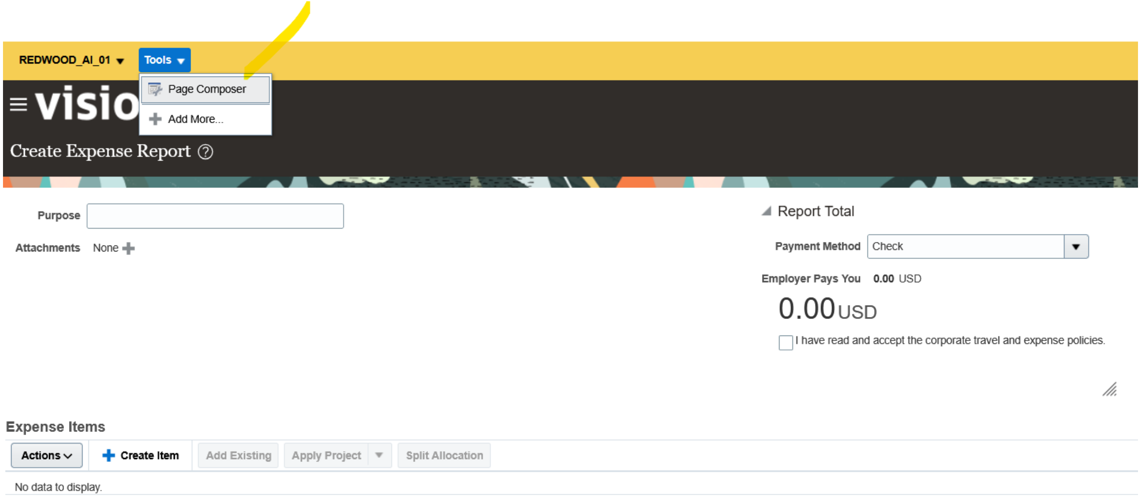
Now click as shown to create.



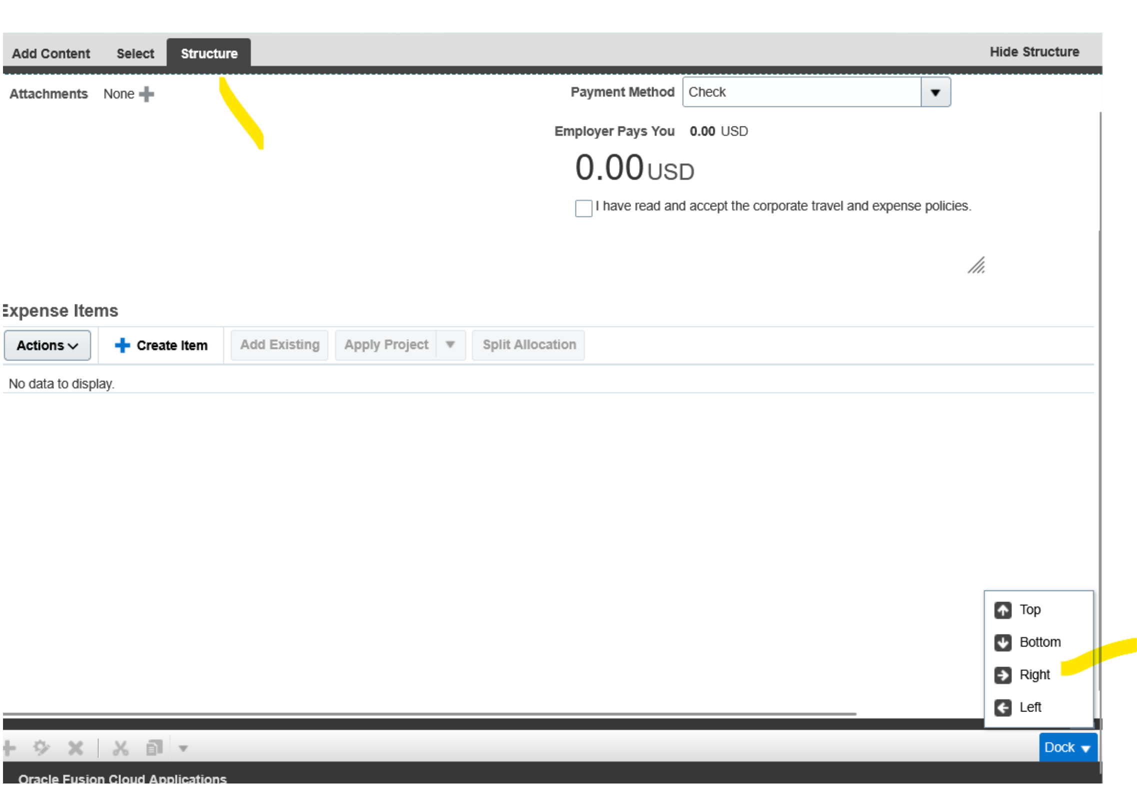
Now navigate SaaS: Menu-Me-Show More-Create Expense Reports



Now enter “Page Composer” tool and let’s see what we can do.

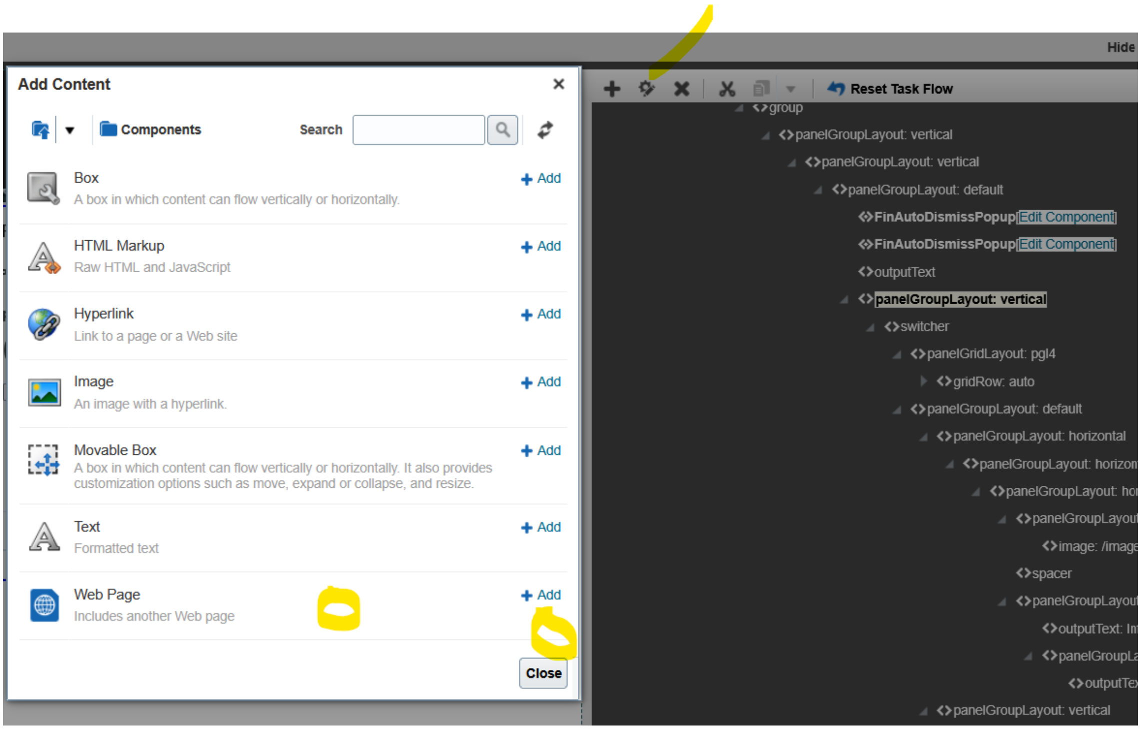


Click as shown.

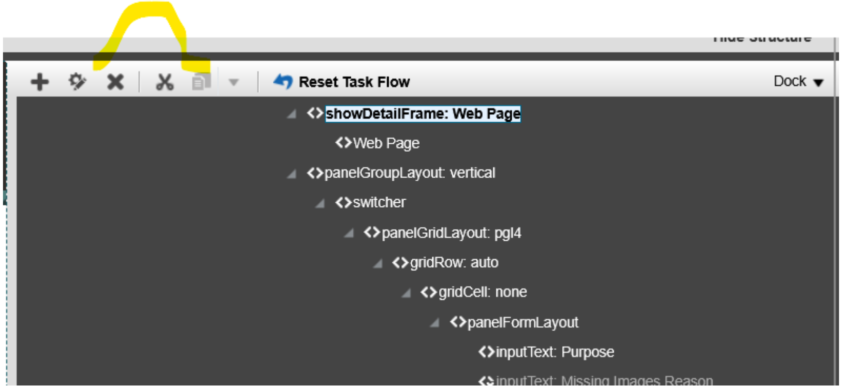


Play with tool to select on the right side of the page where you want to place your embedded agent.

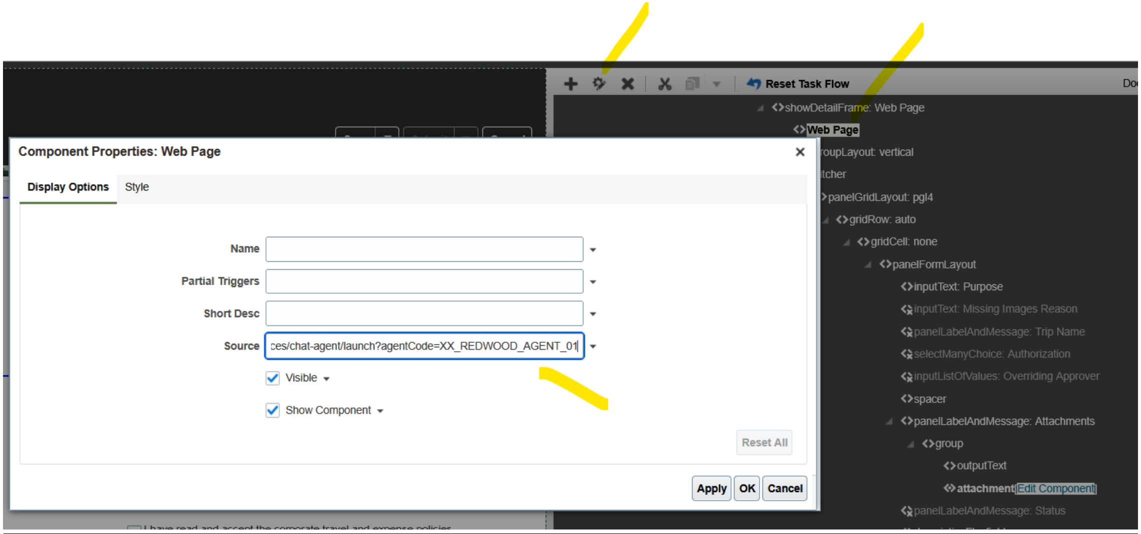
Now click as shown.



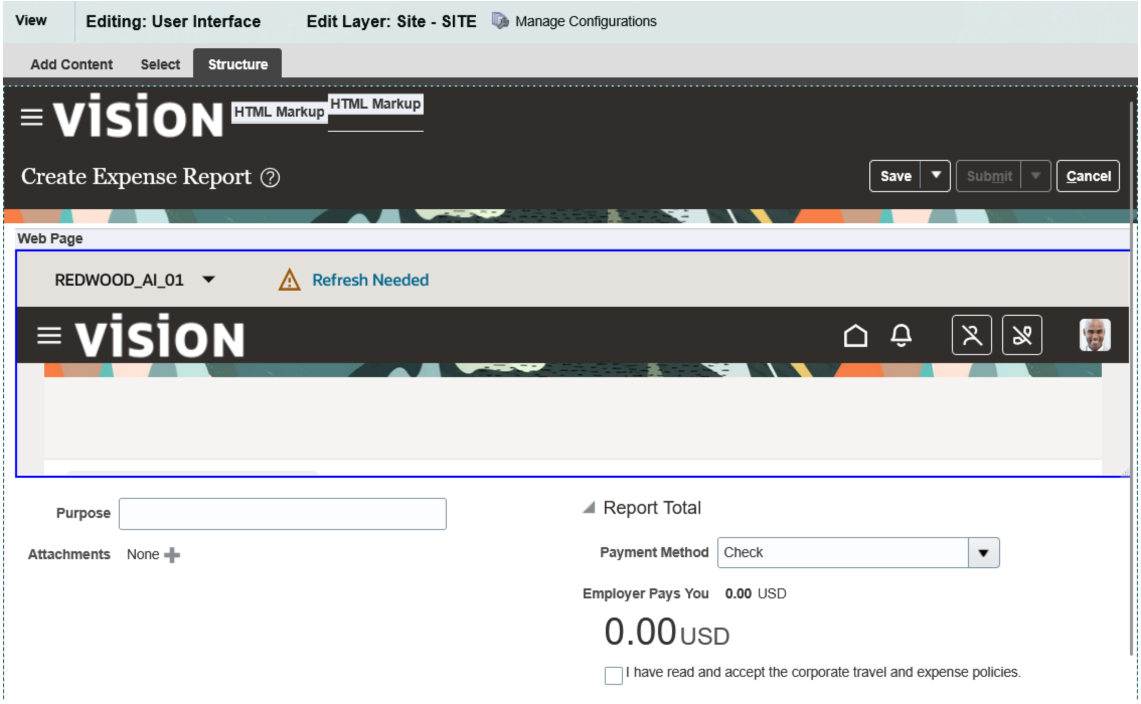
Recommended: play with cut and paste features to get the component in the desired place.



Now include your URL and play with the options, like size, title, etc.

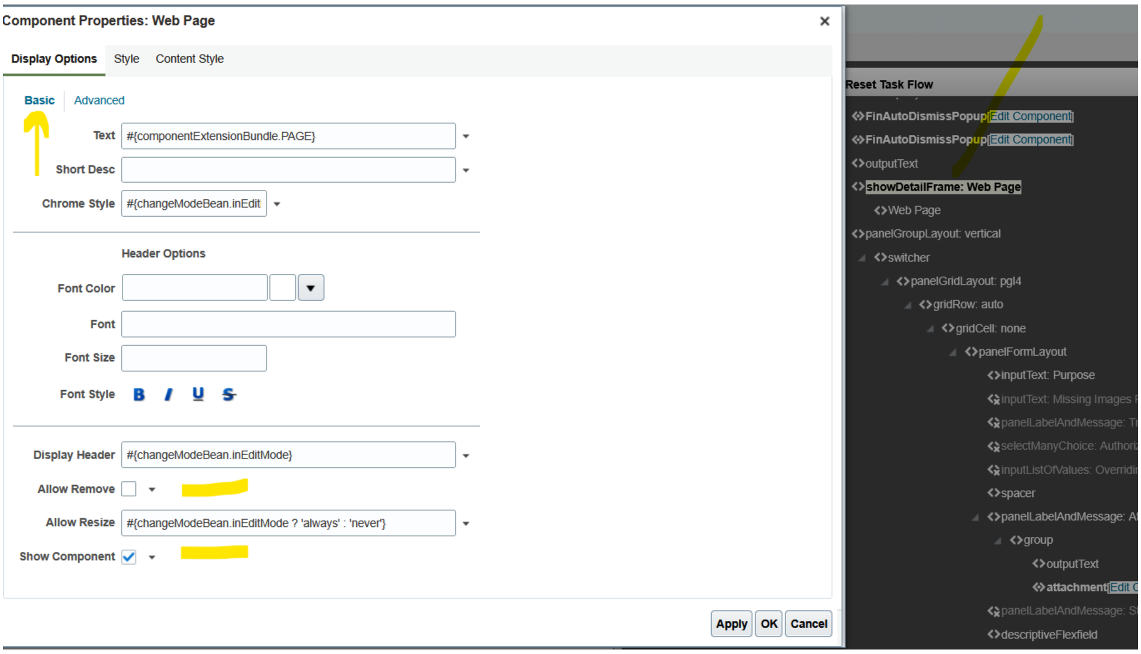


First approach, not very user friendly.

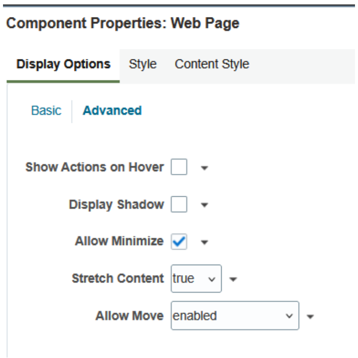


Let's make some adjustments.

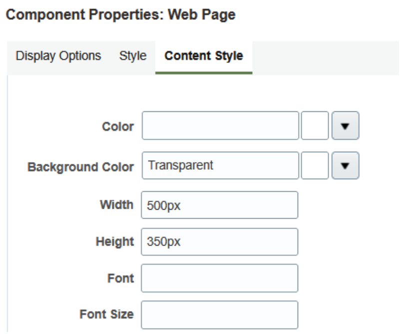
In the component parent of our page, we can play with these options in "Basic" tab.



In Advanced tab we have this:

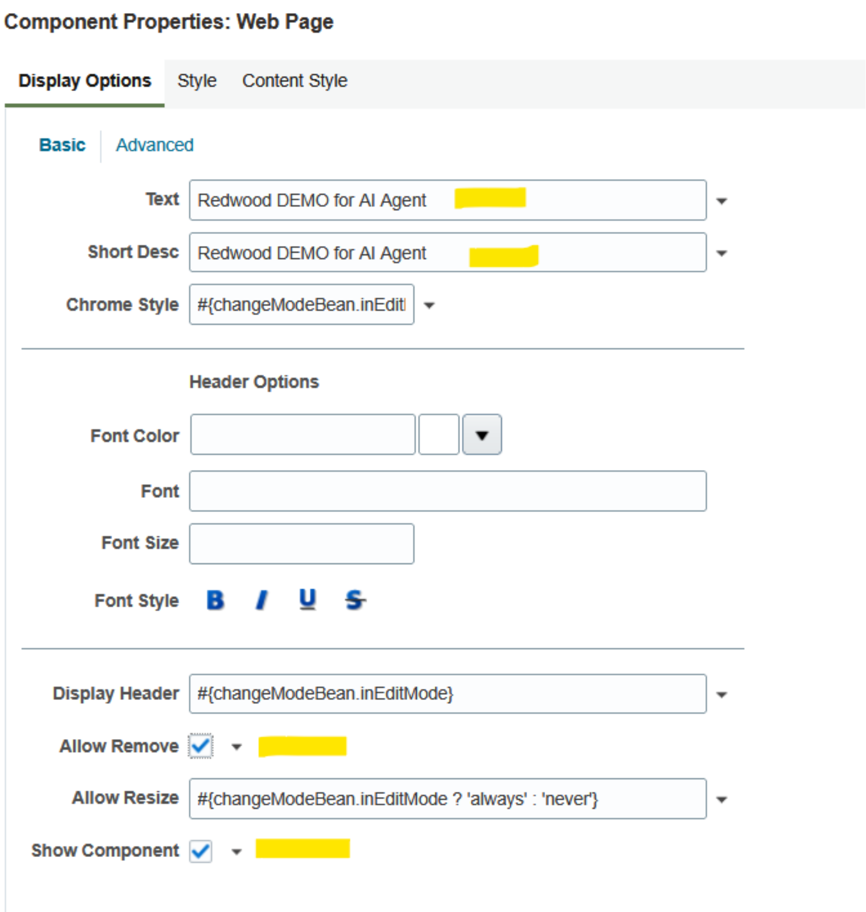


Size.

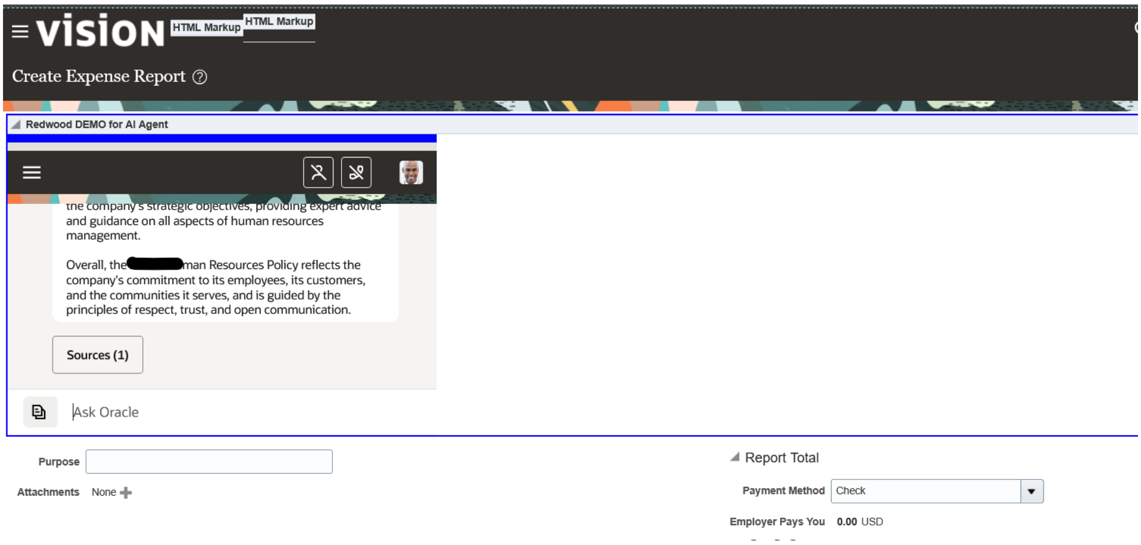


Feel free to play with options.

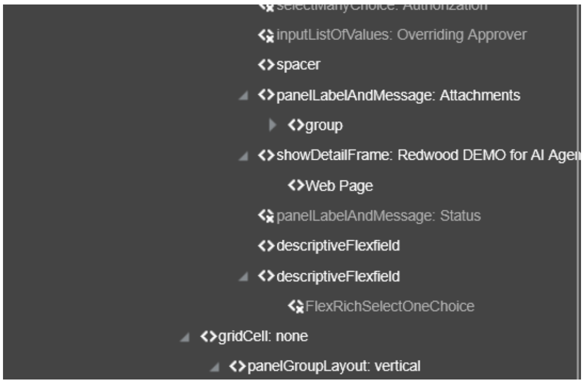
We have used these.

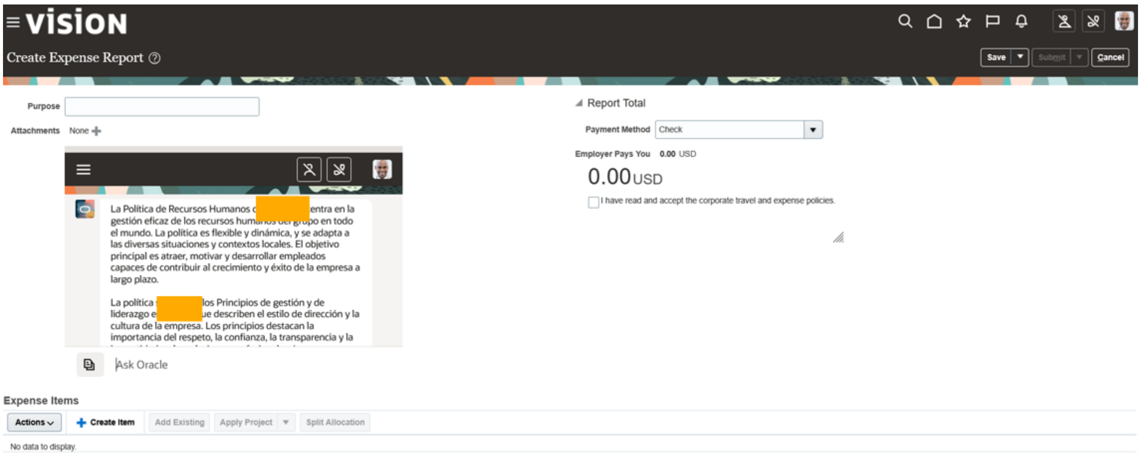


This is our result.



Notice the look and feel improves a bit moving our components below attachments.





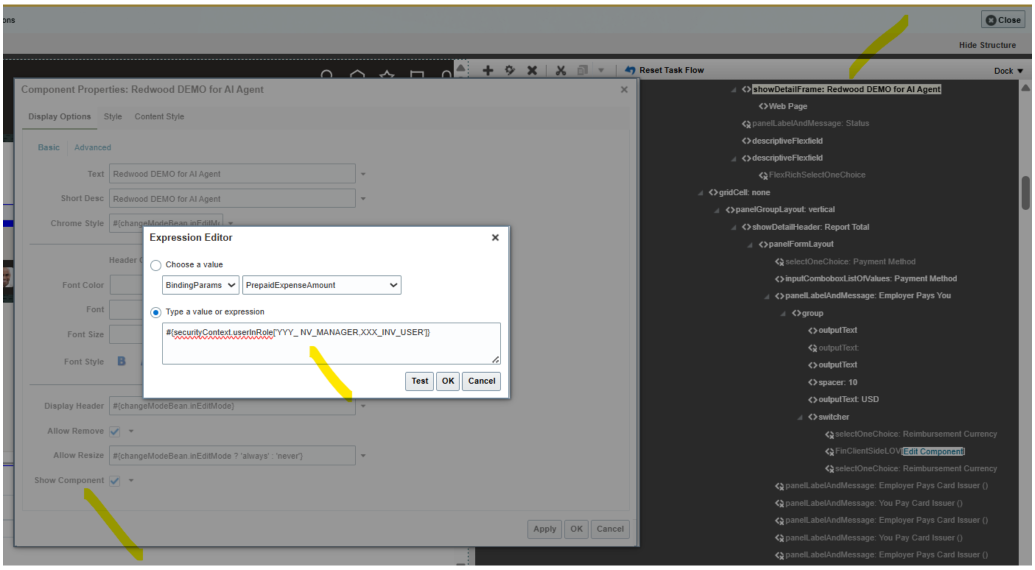
Show/hide component.

Notice that we can hide/show our component using roles. We mean show for example for new employees but hide for others.

The syntax to use SaaS roles to control who is able to see the new option would be as follows.

#{securityContext.userInRole['YYY_ NV_MANAGER,XXX_INV_USER']}

This should be applied here:



Conclusion

Demo showing a basic RAG example with AI Fusion features, in Redwood page using Guided Journey and in ADF-Classic.

For the second, as of now the menu for SaaS is shown, which is not perfect, we are investigating how to remove it.

Remember is a demo for learning purposes.