



Contextual and Guided Journeys

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PURPOSE STATEMENT

This document lists the quick actions and Transaction Design Studio (TDS) actions that are enabled for Contextual and Guided Journeys respectively in Oracle Cloud HCM.

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INTRODUCTION

The associated excel spreadsheet lists the quick actions and Transaction Design Studio (TDS) actions that are enabled for Contextual and Guided Journeys respectively in Oracle Cloud HCM.

Note: This list is applicable from Release **22B** onwards.

CONTEXTUAL AND GUIDED JOURNEYS

	Contextual Journey	Guided Journey
Description	<p>Contextual Journeys can be used to configure tasks that need to be performed by different performers before a HR transaction. For example, tasks that a manager needs to do before a transfer action.</p> <p>Based on the contextual journey setup, when a user initiates a specific HR quick action from either Me, My Team, or My Client Groups, a single contextual journey or a list of eligible contextual journeys displays. The user can then start the relevant contextual journey.</p>	<p>Guided journeys can support users by providing guidance such as tutorials, company policies, and best practices, in the context of an HCM flow, using guided journey tasks. For example, tasks to help a line manager transfer an employee.</p> <p>You can configure guided journey tasks to display at the page header or section header level for supported Transaction Design Studio (TDS) actions using TDS rules.</p> <p>When employees, line managers, or HR specialists initiate an action for which a guided journey has been configured, they see a Guide Me button with the list of tasks to guide them.</p>
Profile Option	Set ORA_PER_CONTEXTUAL_JOURNEYS_ENABLED to Y	Set ORA_PER_GUIDED_JOURNEYS_ENABLED to Y
Configuration	<ol style="list-style-type: none"> 1. Create the Contextual Journey in Checklist Templates with the new category Contextual Journey. 2. Associate the context, which is either Me, My Team, or My Client Groups. Specify the quick action based on which the contextual journey should display. 3. Optionally, configure the criteria to determine which contextual journey or task should display for a quick action using available attributes. 	<ol style="list-style-type: none"> 1. Create a Guided Journey in Checklist Templates with the new category Guided Journey. 2. Optionally, after adding tasks in the template, you can preview the tasks that will display in the guided journey. 3. You need to associate the guided journey to a TDS action. You can leverage the TDS attributes to determine for whom the guided journey should display. 4. Select tasks of a guided journey you want to display in the page header or section header region.
User Interaction	<p>When you initiate a quick action that has a contextual journey configured, here's what happens:</p> <ol style="list-style-type: none"> 1. If there's only one configured contextual journey that qualifies for the quick action, the preview page with the tasks of that contextual journey appears and you can click Start This Journey. Clicking Continue Without Journey directly takes you to the respective quick action page. 2. If there's more than one contextual journey that matches the criteria defined, you are taken to a page where you can select a specific contextual journey from the options and start the journey. 	<p>When the user clicks on the TDS action for which a guided journey is configured, here's what happens:</p> <ol style="list-style-type: none"> 1. They can view the tasks that are part of that guided journey either at the page header or section header level.

	<div><div><div>3. If there's already an in-progress assigned contextual journey and other contextual journeys also exist for the selected quick action, you can either resume the in-progress journey or select a new journey.</div><div>4. If there's no contextual journey configured for a quick action, the responsive ADF page directly opens for the quick action.</div></div></div>																		
Security	<div><div>This table shows the duty roles that supports this feature and the predefined roles that inherits this duty roles.</div><table><thead><tr><th>DUTY ROLE</th><th>JOB OR ABSTRACT ROLE</th></tr></thead><tbody><tr><td>Manage Contextual Journey by Worker ORA_PER_MANAGE_CONTEXTUAL_JOURNEY_BY_WORKER</td><td>Contingent Worker Employee Pending Worker</td></tr><tr><td>Manage Contextual Journey by Manager ORA_PER_MANAGE_CONTEXTUAL_JOURNEY_BY_MANAGER</td><td>Line Manager</td></tr><tr><td>Manage Contextual Journey by HR ORA_PER_MANAGE_CONTEXTUAL_JOURNEY_BY_HR</td><td>Human Resource Specialist</td></tr></tbody></table><div>This table shows the function security privilege that supports this feature and the predefined role that inherits this privilege.</div><table><thead><tr><th>FUNCTION</th><th>DUTY ROLE</th><th>JOB OR ABSTRACT ROLE</th></tr></thead><tbody><tr><td>Bypass Contextual Journeys PER_BYPASS_CONTEXTUAL_JOURNEYS_PRIV</td><td>Manage Contextual Journey by HR ORA_PER_MANAGE_CONTEXTUAL_JOURNEY_BY_HR</td><td>Human Resource Specialist</td></tr><tr><td>Manage Assigned Task Advanced Settings PER_MANAGE_ASSIGNED_TASK_</td><td>Manage Contextual Journey by HR ORA_PER_MANAGE_CONTEXTUAL_JOURNEY_BY_HR</td><td>Human Resource Specialist</td></tr></tbody></table></div>	DUTY ROLE	JOB OR ABSTRACT ROLE	Manage Contextual Journey by Worker ORA_PER_MANAGE_CONTEXTUAL_JOURNEY_BY_WORKER	Contingent Worker Employee Pending Worker	Manage Contextual Journey by Manager ORA_PER_MANAGE_CONTEXTUAL_JOURNEY_BY_MANAGER	Line Manager	Manage Contextual Journey by HR ORA_PER_MANAGE_CONTEXTUAL_JOURNEY_BY_HR	Human Resource Specialist	FUNCTION	DUTY ROLE	JOB OR ABSTRACT ROLE	Bypass Contextual Journeys PER_BYPASS_CONTEXTUAL_JOURNEYS_PRIV	Manage Contextual Journey by HR ORA_PER_MANAGE_CONTEXTUAL_JOURNEY_BY_HR	Human Resource Specialist	Manage Assigned Task Advanced Settings PER_MANAGE_ASSIGNED_TASK_	Manage Contextual Journey by HR ORA_PER_MANAGE_CONTEXTUAL_JOURNEY_BY_HR	Human Resource Specialist	<div><div>You must be granted the Access HCM Common Components (HRC_ACCESS_HCM_COMMON_COMPONENTS) function privilege to view guided journeys on the transaction pages.</div></div>
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	ADVANCED_SETTINGS	L_JOURNEY_BY_HR		
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