

Aspire Consulting

Journey Through Journeys

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July 14, 2023

Agenda

- Defining Journeys
- Journey App
- Journey Types
- DEMO: Creating a Journey & Assigning it
- Archiving and Purging Journeys
- References



Defining Journey

- **Checklist:** Group of tasks needing to be completed when an action occurs. (e.g. onboarding new hires, off boarding, or transferring a worker, enrolling in benefits).
- **Journeys:** Extend the functionality of checklists and centralize all checklist of any category into a single application. Previous to journeys access to checklist were broken down making it impossible for someone to see all tasks in a single place



Journey App

■ Explore

- Allow you to generate a journey and assign out
- 'Create+' **ONLY** Accessible by HR Specialist or Line Manager (Personal Journeys)

■ My Journeys

- Find Journey's you are involved with and jump into them
- Filter by
 - Open
 - Completed
 - Category (e.g. On Boarding, Survey, Person, etc)

■ My Tasks

- Look at all tasks you need to do regardless of whose journey your task sits with
- Reassign a task from here
- Mark as done

■ Assigned Journeys

- Journeys YOU have assigned to OTHER people
- Filter by Direct Reports, All reports, Organization wide

■ Activity

- Filter by Direct Reports, All reports, Organization wide



Journey Type

- Contextual
- Guided
- Oracle Process Automation
- Survey
- Personal



Journey Type - Contextual

- **Purpose:** Configure tasks needing to be performed by different performers BEFORE an HCM transaction. For example, tasks a manager needs to do before a transfer action.
- Category on the checklist template must be set to “Contextual Journey”
- Must associate the checklist template to an action name (e.g. Transfer, termination, etc.)



Journey Type - Guided

- **Purpose:** Provides guidance, such as tutorials, company policies, and best practices in the context of an HCM flow. For example, tasks to help a line manager transfer an employee.

These are not hard tasks like a contextual journey that must be completed. It is a way to provide information as someone steps through a flow.

- Category on the checklist template must be set to “Guided Journey”
- Uses **Transaction Design Studio** to embed the journey into the flow at the header or section levels of the action
- Task Types are limited to:
 - Analytics
 - Document
 - Embedded Learning
 - External URL
 - Manual Task
 - Questionnaire
 - Report
 - Video



Journey Type – Oracle Process Automation (OPA)

- **Purpose:** Ability to automate a task by executing a job (e.g. Ordering a badge during the new hire onboarding). OPA is part of Oracle Identity Cloud and may require additional licensing to utilize this functionality
- Must establish a connection to OPA via “Checklist Integrations”
- Requires you to set the Task Type to “Process Automation”
- You need two tasks
 - Process Section = Start Process (This initiates the process when the performer actually starts the task)
 - Process Section = Check Process Status



Journey Type – Survey

- **Purpose:** Allows for a journey to have a questionnaire attached and then the journey can be assigned to a population and scheduled to run every 'x' period of time if need be (e.g. Ask for employee feedback after Open Enrollment closes to get feedback on user experience)
- Category on the checklist template must be set to "Survey"
- Must create a questionnaire in order to attach to the checklist template
- To see the results you must create a BI Report or a Touchpoint Dashboard
- Notifications pop up when the Survey is pushed so an individual does not necessarily need to navigate to the Journey App



Journey Type – Personal

- **Purpose:** Allows
- Accessible from the “Explore” tab in Journeys, but only if a Line Manager and/or HR Administrator (create journey button)
- Can create something for yourself, your team, or others

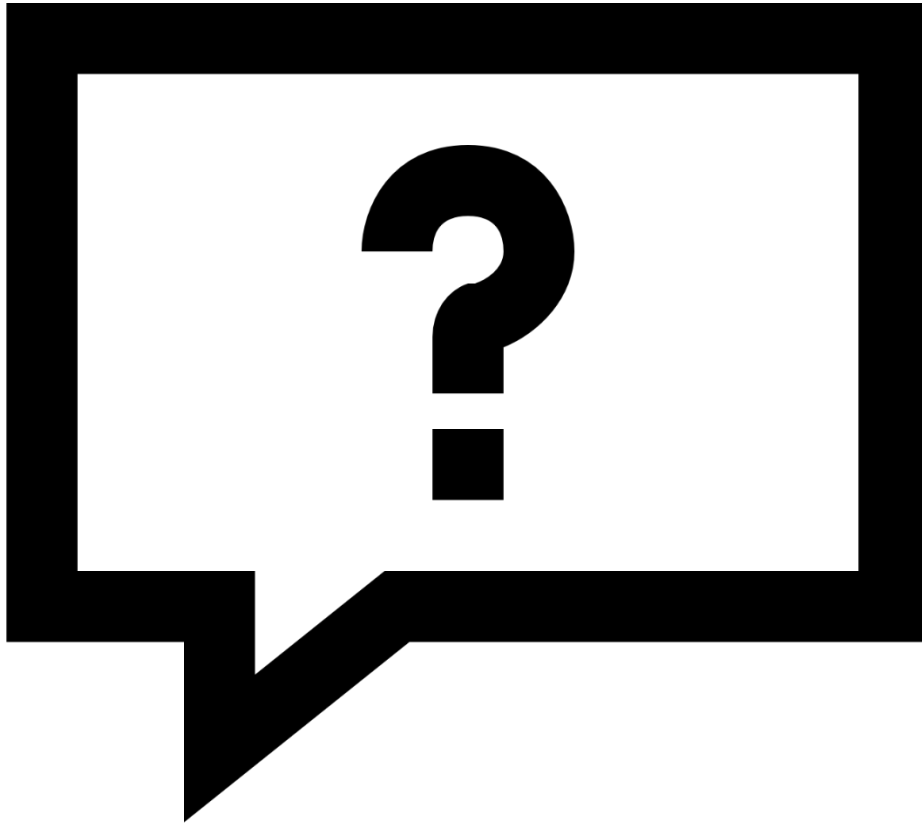


Demo

- Journey App
- Show Case Journey Types
 - Contextual
 - Guided
 - Survey
 - Personal



Questions



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