Oracle Fusion Cloud Human Resources

Administering and Using Oracle Me Applications

Oracle Fusion Cloud Human Resources
Administering and Using Oracle Me Applications

G34698-04

Author: Priya Muralimohan, Alison Firth, Ashita Mathur, Byju Thampi, Ram Balasundaram

Contents

Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Some application pages have help icons to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

Get Training

Increase your knowledge of Oracle Cloud by taking courses at *Oracle University*.

Join Our Community

Use *Cloud Customer Connect* to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest *ideas* for product enhancements, and watch events.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to *oracle_fusion_applications_help_ww_grp@oracle.com*.

Thanks for helping us improve our user assistance!

1 Overview of Oracle ME

Introduction to Oracle ME

Oracle ME (My Experience) is a complete employee experience platform that guides employees through professional and personal activities and streamlines communication across the organization. It has tools to strengthen the manager-employee relationship, connect employees with their peers in meaningful ways, and celebrate achievements.

Here are the products and features included in Oracle ME:

HCM Communicate: An employee outreach solution that enables you to design, distribute, monitor, act on, and measure the impact of multitouch communications.

Journeys: Step-by-step personalized, contextual guided workflows that help employees complete professional and personal activities, all with one user experience.

Grow: A single, hyper-personalized experience unifying learning, skills development, and talent mobility opportunities.

Touchpoints: Continuous engagement tools that allow you to capture, track, and act on employee sentiment.

Connections: An interactive workforce directory and organization chart that gives workers a way to search for and connect with others across the organization.

Celebrate: A recognition and rewards solution that helps organizations make peer-to-peer recognition meaningful, easy, and continuous with holistic engagement insights.

2 Celebrate

Introduction to Oracle Celebrate

Oracle Celebrate enables employees to recognize and share their colleagues' achievements, encouraging a culture of appreciation within the organization.

- Create recognition programs based on core values, across your organization.
- Enable employees to participate in the programs, send reward points, post congratulatory messages that others can see, and react on their dashboards.

How You Configure Oracle Celebrate

- Administrators configure global settings and create recognition programs.
- Employees use the Celebrate work area to select a recognition program and send recognitions to their colleagues.

Related Topics

- Configure Global Settings
- Create Programs

User Roles and Privileges for Oracle Celebrate

Managers and employees need to have the following user roles, respectively, to access Oracle Celebrate:

Job Roles	Features	Navigation
WorkforceRecognition and Award Program Administrator ORA_CEL_WORKFORCE_RECOGNITION_ AND_ AWARD_PROGRAM_ADMINISTRATOR_JOB	Global settings	**Navigator** > **My Client Groups** >**Show More> Configure Global Settings** under Celebrate.
	Programs	**Navigator** > **My Client Groups** >**Show More> Configure Programs** under Celebrate.
Employee ORA_PER_EMPLOYEE_ABSTRACT	• Recognize your peers. • View and respond to the recognitions happening around you.	**Navigator** > **Me** > **Show More> Celebrate** under Celebrate.

Configure Global Settings

You can configure reward points, core values, and program images. The rules that you define here apply to all programs.

Click **Navigator** > **My Client Groups** > **Show More** > **Configure Global Settings**. You can find the page under the Celebrate section.

You can configure these key aspects:

Reward Points

You can configure the recognition program to send rewards points along with each recognition. Employees can’t redeem the points they receive. If your organization doesn't use reward points in recognitions, you can deselect the **Reward Points** option. If reward points are enabled for a program, each employee receives 200 points per month to recognize others.

Redeem Points

You can enable the Redeem Points option to have employees convert their reward points to cash. They'll receive the equivalent amount in their next paycheck. You need to select the currency to which you want the points to be converted and enter the conversion rate. For example, you can select USD as the currency and 2 as the conversion rate to indicate that 2 points are equivalent to 1 USD. Also, select a payroll element or click Add Payroll Element. After the conversion, the equivalent amount is paid through element entries

Core Values

Core values are the fundamental principles and beliefs of an organization. In Celebrate, you can enable employees to recognize core values that their colleagues exhibit. When you define core values here, they’re available to all programs you create.

Program Images

A program image provides visual appeal to a recognition message that your employees can send to their colleagues. Apart from the images shipped with the product, you can even upload your own. When you define images here, they’re available to all programs you create

Create Programs

A recognition program or award program enables employees to appreciate the contributions and achievements of their colleagues.

Recognitions mainly happen among peers. Mangers send awards to the employees, and the award include something valuable such as points or cash.

To enable employees to send recognitions and awards, you need to create at least one program. You use the Recognition and Award Programs page to create and manage such programs.

Click **Navigator** > **My Client Groups** >**Show More> Configure Programs. Add Program**. You can find the page under the Celebrate section.

Here are the common features available in recognition and award programs:

- Usage of reward points.
- Availability of program owners so that the program applies to everyone in the owner's organization.
- Eligibility profiles to restrict the program recipients. Click **Add Profile** to add eligibility profiles. Select the check box named **Required** if you want to mark the eligibility profile as mandatory when evaluated. If the check box isn't selected, the eligibility profile is considered optional.
- Core values that employees can use as a basis to appreciate their colleagues.
- Images that employees can include in their award.

As part of the recognition program, you can also set up a Quick Recognition template. The quick recognition template allows employees to recognize their colleagues more easily by using a prefilled template. In the template, you include a core value, an image, and a default headline and message. Also, you can use AI Assist to help you in writing the message for a recognition.

As part of the award programs, you can select the award type as reward points, cash, or other type. If you select **Cash** as the Award Type, you need to select a payroll element or click **Add Payroll Element**. Cash awards are paid through element entries.

Send Recognition to a Person

You can use the Oracle Celebrate work area to appreciate someone you worked with.

You can also view and respond to the recognitions happening in your organization. You can edit or remove your own recognitions and comments. Here's how you recognize others:

1. **Navigator** > **Me** > **Show More** > **Celebrate**. You can find the page under the Celebrate section.
2. Click the **Recognize** button and follow the prompts. You can also click the image under the Quick recognize section to recognize by using a prefilled template. You can use AI Assist to help you in writing the message for a recognition. The AI tool considers the name of the person that you are recognizing, the core values you have selected, and the draft message you have entered to provide a revised version of the headline and congratulatory message.

Send Awards to a Person

After you create the award programs, managers can send awards from their dashboards.

You can click the **Send Award** button to appreciate the achievements of your employees. You select the person, the award program, the core values you want to recognize them for, and an appropriate image to convey the essence of the award. You can write a suitable headline and a congratulatory message to appreciate the good work. You can provide instructions on how the employee can redeem the award. For example, you can give instructions on how to reimburse the dinner bill for a team award.

1. **Navigator** > **My Team** > **Show More** > **Team Overview**.
2. Click the **Send Award** button and follow the prompts.

   You can also navigate to the Employees page from the Overview page to send awards or recognitions.

Convert Reward Points to Cash

Here's how employees convert their points to cash:

1. Click **Navigator** > **Me** >**Show More**> **Celebrate** under Celebrate
2. Click **Points** from the navigation menu.
3. Click **Convert Points to Cash**.
4. Enter the points to convert.
5. Click **Submit**.

Generate Element Entries for Cash Awards

You pay cash awards using payroll element entries.

You need to transfer cash awards into payroll elements through a scheduled process.

Here's how generate element entries through the process:

1. Click **Navigator** > **My Client Groups** > **Show More** > **Generate Award Element Entries**. You can find the page in the Celebrate section. The Generate Award Element Entries process allows you to create element entries for the cash awards related to a particular program.
2. Select a cash award program. The element details appear.
3. Select the element details and click **Run** to submit the process to generate element entries.
4. To monitor the process, navigate to the action tab and click View Results. You will be redirected to the home page of the process for logs inspection. If you want to preview the results first, you can run the process in trial mode.

Understand How Your Teams Use Oracle Celebrate

You can use the dashboards to get insights into how your teams use Oracle Celebrate.

These dashboards are useful to track, analyze, and enhance the recognition and awards culture within an organization:

- Overview
- Employees
- Awards

Oracle Celebrate Dashboard Pages

Page Name	Description	Navigation
Overview	This is the main page and provides an at-a-glance summary of recognition activities within the team, such as the total number of recognitions given and received. Also, you can send awards to employees from this page. It offers a visual representation of trends in recognition activity over the past 12 months through graphs. This data can help identify seasonal trends or changes in engagement. The page highlights the core values that are most frequently associated with received and sent recognitions. This data helps identify which values are most emphasized within the team. A leader board displays employees who have received the highest number of recognitions. This encourages healthy competition and motivates team members to recognize each other more frequently. The overview page also includes a section dedicated to awards. It shows the count of awards that are sent and received by employees and shows trends in award activity over the past 12 months through graphs. To switch views between the main team and sub-teams, click the **Switch Team** button and select the direct report to view the insight of their team.	Click **Navigator** > **My Team** > **Show More** > **Team Overview**.
Employees	The employees page shows a list of the team members with different filters and sorting options. From this page, you can recognize your team members or send awards. You can also drill down to a summary page to see individual employee information.	Click **Navigator** > **My Team** > **Show More** > **Team Overview**. Navigate to the Employees page from the Overview page.
Awards	The award page shows a list of the awards received by your team with different filters and sorting options.	Click **Navigator** > **My Team** > **Show More** > **Team Overview**. Navigate to the Awards page from the Overview page.

3 Connections

Overview of Connections

Use Connections to search for colleagues across functions and departments and find information about them. The application enables you to build work relationships, engage, and collaborate better with your coworkers.

With Connections, you can:

- Search and find coworkers quickly. Browse and filter search results easily using Oracle Search.
- View a coworker's profile for information like work location and time zone to schedule meetings.
- Add information about yourself in your profile for your coworkers to know and collaborate better with you.
- Use Favorites to mark people that you interact with often, or to build a network of people to help achieve your career objectives.
- See people's assignments, interests, and expertise to discover what you have in common with them. If a person has multiple assignments, you'll see multiple search results and view the assignment details in their profile.
- View a coworker's organization chart to understand their role and how they relate within their organization structure.
- Provide feedback to your coworkers and view feedback given to them by others depending on your role.

Configure Connections

Set Up Connections

Before you start setting up Connections, here's what you need to do:

- Enable the Workforce Deployment offering to view the profile options for Connections. For more information, see *Overview of Global Human Resources*.
- Review your existing profile option settings and check if any of them might impact the Connections search. For more information, see *Profile Options Considerations for Connections Search*.

To set up Connections, you need to enable the profile options for Connections and configure Oracle Search.

Profile Options for Connections

Go to the Setup and Maintenance area, **Manage Administrator Profile Values** task and enable these profile options:

Profile Option Code	Profile Display Name	Application	Module	Profile Level	Profile Value
HCM_RESPONSIVE_ PAGES_ENABLED	Mobile-Responsive HCM Pages Enabled	Global Human Resources	Global Human Resources	Site	Y

Profile Option Code	Profile Display Name	Application	Module	Profile Level	Profile Value
HCM_CONNECTIONS_ENABLED	HCM_CONNECTIONS_ENABLED	Global Human Resources	Global Human Resources	Site	Y

Configure Oracle Search

1. Go to the Setup and Maintenance area, **Manage Administrator Profile Values** task and enable these profile options:

Profile Option Code	Profile Display Name	Application	Module	Profile Level	Profile Value
ORA_FND_SEARCH_EXT_ENABLED	Enable/Disable Search Ext Framework	Oracle Middleware Extensions for Applications	Oracle Middleware Extensions for Applications	Site	Yes
HRC_ELASTIC_SEARCH_ENABLED	HRC: Enable Elastic Search	HCM Common Architecture	Search Framework	Site	Y

2. In the **Tools** > **Scheduled Processes** work area, run this scheduled process for each of the listed indexes.

Job Name	Parameter Name	Parameter Value
Scheduled process to create index definition and perform initial ingest to OSCS	Index Name to Reingest	fa-hcm-person
		fa-hcm-profile-tag

Note: Run the initial data ingestion process after each release version upgrade and after each P2T (production to test) process.

Profile Options Considerations for Connections Search

These profile options might impact the Connections search. Review these profile settings before you set up Connections.

Profile Option Name	Purpose	Default Value
PER_WORKER_SEARCHES_PERSON_NUMBER_SEARCH_ENABLED	Enables search by person number.	N
PER_PERSON_INDEX_FUZZY_SEARCH_ENABLED	Enables fuzzy search on person names and allowing up to 2 spelling differences.	Y
PER_WORKER_SEARCHES_LEADING_EMAIL_SEARCH_ENABLED	Enables a focused search on the work email if the search terms entered appears to be an email address.	Y

Profile Option Name	Purpose	Default Value
PER_WORKER_SEARCHES_LEADING_EMAIL_LOCAL_PART_SEARCH_ENABLED	Enables a focused search on the work email local part (before the @) if the search terms entered are alphabetic characters separated by a period.	Y

Roles Required for Connections

To use Connections, you need a custom employee or contingent role that has:

- HCM Connections REST Services privilege
- ORA_HRT_REST_SERVICE_ACCESS_TALENT_PERSON_PROFILES aggregate privilege You need this role to use the About Me panel. It's included in these duty roles, by default.
    - ORA_HRC_HUMAN_CAPITAL_MANAGEMENT_INTEGRATION_SPECIALIST_JOB
    - ORA_HRT_ACCESS_SKILLS_CENTER
    - ORA_PER_CONNECTIONS_DUTY

      This role is included in these abstract roles, by default:

        - ORA_PER_CONTINGENT_WORKER_ABSTRACT
        - ORA_PER_EMPLOYEE_ABSTRACT
- Manage Scheduled Job Definition privilege, FND_MANAGE_SCHEDULED_JOB_DEFINITION_PRIV

  You need this privilege for running the Oracle Search initial data ingestion process. It's available in these job roles, by default.

    - ORA_FND_APPLICATION_ADMINISTRATOR_JOB
    - ORA_FND_APPLICATION_DEVELOPER_JOB

After adding the privileges, you must regenerate the grants for the data role.

Use Connections

Search for People in Connections

You can access the Connections application from a quick action in the Me tab. On the Connections page, use a person's name or email to search.

As you type your search criteria, you see an autosuggested list of results that you can select from to open a person's profile. If you don't see the person you're searching for in this list, you can press Enter and see another list of profiles that match your search criteria.

You can search using various person-related fields, but Connections uses people's names for a primary search and other fields are secondary.

You can also click the **Advanced Search** icon on the page to view filters across categories. You can select multiple values to refine your search. When you click a filter, a list of values available for that filter along with the number of people that match that filter are displayed in a list. For a filter, the top 10 values with more number of results are displayed, but you can search for other values. Select a value from the list and apply it to your search for more targeted results. The available filters include Country, City, Tags, Title, Location, Job, Department, and Position.

After you search for a person and press Enter, you'll see some results that match your search criteria. To see more results, click **Show All Employees** and you can see all results that match your search criteria.

Connections performs a fuzzy search so that people whose names closely match your search criteria are also displayed. For example, if you search for person named 'Anderson', you can see results with names like 'Andersen'. This means you can still find the person you're looking for if you don't know how their name is spelled or if you type a name incorrectly.

After you visit a person's profile from the main page, you can search for other people from that profile. You need not go back to the Connections page to search for other people.

What's a Connections Profile

Your Connections profile includes information about yourself in different sections. Some information is initially available, and you can add more details about yourself. Here's what your profile includes and the details you can add to it.

- Header: Header contains your name, contact information, business title, work location, work phone number, your Slack and Zoom details. You can add a display picture and links to your social media profiles like LinkedIn, Twitter, and Facebook. You can use the use the icon next to the phone numbers and email addresses to copy and then paste them elsewhere easily.
- Organization: Organization displays your reporting hierarchy, your reports if you have any, number of reports, job, department, business unit, and Areas of Responsibility representatives.
- About Me: You can describe yourself and your work here. You can add your areas of interest, expertise, and work experience. You can also add tags that indicate your work, interests, expertise, and anything that represents you. Your colleagues can use tags to search for people in Connections. You can also use artificial intelligence to generate content about yourself using keywords that describe your job and any other details.
- Favorites: If you're using Oracle Grow, you can mark connections as favorites from their profiles to create a network of people. On the Oracle Grow page, you'll see them all in the Connections region. You can also find others who are considered Popular in your role. You need to have the Access Career Growth by Worker privilege added to your role to add favorite connections.
- Skills and Development: You can see this panel on your profile if you've purchased and implemented Dynamic Skills. For more information, see the Dynamic Skills documentation.
- Experience: This section contains your tenure with the company and your enterprise service history.
- Links: You can add links of your interest in this section.
- What Others Think: You can view the feedback you've received, thank the person that sent you feedback, and provide feedback for your colleagues. The person who sent you feedback can select who can view their feedback to you.

All information displayed on the profile is considered public information, except for the What Others Think section, which is displayed based on the visibility option the feedback provider has selected.

Related Topics

- Understanding Skills Center
- Resources and Actions for Your Career Growth

4 Grow

Overview of Oracle Grow

Oracle Grow enables employees to achieve their aspired career paths and roles by bringing together many elements that help career development. Employees can use Grow to develop their skills, get learning recommendations that are best for their current role and the role they aspire to grow into.

As an employee, here's what you can do using Oracle Grow:

- Get a consolidated view of interests, objectives, and skills that you choose or that are chosen for you in other parts of the application.
- Get learning recommendations from Oracle Fusion Cloud Learning to enhance your skills.
- Track the status of tasks assigned to you and follow them up to completion.
- Use Connections and follow people that are popular among your peers.
- Get relevant Journey recommendations and have them assigned to you.
- Get learning recommendations that help you excel in your current role and grow in the careers you're interested in.
- Complete learning courses that make you ready for the jobs and gigs you're interested in.

As a manager, here's what you can do:

- Assign learning courses to your employees based on the careers they're interested in.
- Assign predefined journeys that help employees achieve their career goals.
- Add skills that your employees can develop and so that they get relevant learning suggestions.
- Suggest gigs and jobs in Opportunity Marketplace to help your employees gain competencies.

You can access your Grow page using:

- The **Grow** quick action on the **Me** tab.
- The global search available across HCM applications.

Implement Grow

Prerequisites for Grow

Here are the prerequisites to implement Oracle Grow.

You need one of these abstract roles with the Career Growth Access Worker duty, ORA_HRD_CAREER_GROWTH_ACCESS_BY_WORKER_DUTY, assigned to you:

- Contingent Worker, ORA_PER_CONTINGENT_WORKER_ABSTRACT
- Employee, ORA_PER_EMPLOYEE_ABSTRACT

These products and features should be enabled:

Required	Recommended	Optional
Oracle Learning: Oracle Grow uses it to provide learning suggestions.	**Oracle Dynamic Skills**: Oracle Grow provides development and growth recommendations based on the skill set you're looking to develop.	**Journeys**: Oracle Grow lets you take up predefined journeys and also build your own personalized development journeys. These journeys must be of the category, Career Development.
	Opportunity Marketplace: You can view comprehensive details about your career role and other roles that you might be interested in using Opportunity Marketplace. In addition, Oracle Grow suggests learning recommendations for the jobs and gigs that you're interested in. **Oracle Recruiting Cloud**: Opportunity Marketplace is available in Oracle Recruiting Cloud.	**Connections**: Add favorite connections and view popular connections in Oracle Grow.
	Profile Management: Oracle Grow receives an employee's skills, competencies, and accomplishments from their talent profile.	**Career Development**: Oracle Grow provides a comprehensive view of an employee's career information in the legacy Career Development experience.

One-time Setup Tasks for Grow

To set up Grow, as an administrator, you need to complete these one-time setup tasks:

- *Enable Profile Options for Grow*
- *Run Scheduled Processes for Grow*
- *Create a Job or Position Profile and Add Skills*
- *Define a Career Progression Path*

Also, you need to complete these extra tasks to display the required data in each of the panels in Grow:

- *Additional Set Up for Career Interests and Objectives*
- *Additional Set Up for Excel In Your Current Role Tab*
- *Additional Set Up for Grow Your Career Tab*

Enable Profile Options for Grow

Enable these profile options as a one-time setup activity for each of these products that support Grow.

Career Development

Profile Option Code	Description
HRC_ELASTIC_SEARCH_ENABLED	Enables elastic search-based search engine for HCM objects.

Profile Option Code	Description
ORA_FND_SEARCH_EXT_ENABLED	Checks if Search Extension is enabled.
ORA_HRD_EXPLORE_CAREERS_ORACLE _ SEARCH_ENABLED	Enables Oracle Search for exploring careers.
HRT_PROFILE_ORACLE_SEARCH_ ENABLED	Enables Oracle Search for Talent Profile and Model Profile search pages.
ORA_HRD_AI_BEST_ROLES	Enables AI-based career suggestions on the Explore tab in Opportunity Marketplace.

Dynamic Skills

Profile Option Code	Description
ORA_HRT_AI_SKILLS_ASSISTANT	Enable AI-based skill suggestions.

Learning

Profile Option Code	Description
HRC_ELASTIC_SEARCH_ENABLED	Enables elastic search-based search engine for HCM objects.
ORA_WLF_ORACLE_SEARCH_ LEARNINGRECOMMENDATION_ENABLED	Enables Oracle Search for learning recommendation in responsive UI.

Connections

These are required to set up the search feature in Connections.

Profile Option Code	Description
ORA_FND_SEARCH_EXT_ENABLED	Enables elastic search-based search engine for HCM objects.
HRC_ELASTIC_SEARCH_ENABLED	Checks if Search Extension is enabled.

Enable **one** of these profile options:

Profile Option Code	Description
ORA_PER_ORACLE_SEARCH_ WORKERSLOV _ENABLED	Enable Oracle Search-based search engine for search with workersLov rest.
HCM_CONNECTIONS_ENABLED	Enable the connection HCM pages.
FUSION_APPS_SEARCH_ENABLED	Enable search in the global header on all pages.

Profile Option Code	Description
ORA_HRM_ENABLE_SUCCESSION_ORG_CHART	Enable succession organization chart.

Opportunity Marketplace

Profile Option Code	Description
ORA_HCM_OPP_MARKET_PLACE_GIGS	Enable gigs in Opportunity Marketplace.
ORA_HCM_OPP_MARKET_PLACE_JOBS	Enable jobs in Opportunity Marketplace.
ORA_HCM_OPP_MARKET_PLACE_CAREER_ROLES	Enable career roles in Opportunity Marketplace.

Related Topics

- How do I enable a profile option?

Run Scheduled Processes for Grow

From **Navigator** > **Tools**, use the Scheduled Processes task to run these processes as a one-time activity and also when required.

Career Development

Scheduled Process	Parameter
ESS job to create index definition and perform initial ingest to OSCS	Set Index Name to Reingest to **fa-hcm-modelprofile**
Process Career Roles for Oracle Search Ingestion	None
ESS job to create index definition and perform initial ingest to OSCS	Set Index Name to Reingest to **fa-hcm-careerrole**

Dynamic Skills

Scheduled Process	Parameter
Propagate Dynamic Skills to Workers **Note:** Run this scheduled process on a daily basis to propagate core and role skill assignments to the person profiles of the target population and to Skills Center.	None
ESS job to create index definition and perform initial ingest to OSCS	Set Index Name to Reingest to **fa-hcm-teamskills**

Learning

Scheduled Process	Parameter
ESS job to create index definition and perform initial ingest to OSCS **Note:** Run this scheduled process as a one-time setup activity or when required.	Set Index Name to Reingest to **fa-hcm-learningitem**
ESS job to create index definition and perform initial ingest to OSCS **Note:** Run this scheduled process when required to refresh recommendations.	Set Index Name to Reingest to **fa-hcm-learningrecommendation**

Connections

Scheduled Process	Parameter
ESS job to create index definition and perform initial ingest to OSCS	Set Index Name to Reingest to **fa-hcm-person**

Create a Job or Position Profile and Add Skills

As an HR specialist, complete these one-time setup tasks:

1. Define a position profile or job profile for a career role from **My Client Groups** > **Profiles** > **Job Profiles** or **Position Profiles**.
2. Set the status of the job or position profile as **Active**.
3. Associate it with a matching position or job. Ensure that the employee has this job or position assigned to them.
4. Add skills to the **Skill Center** content section of the job or position profile. At a minimum, mark one or more skills as Required.

Define a Career Progression Path

The career progression path for a career role is displayed if it's defined for a job or position. As an HR specialist, perform these steps to define it for a job:

1. In Setup and Maintenance, search for the **Define Jobs and Positions** task list, and select the **Manage Job** task.
2. Search for the job and edit it.
3. Select the next job in the career path from the Progression Job field.

> **Note:** Note that for positions, the career path is displayed based on the job to which the position is associated. To view the job-to-position association, use the **Manage Positions** task in Setup and Maintenance.

Additional Set Up for Career Interests and Objectives

In addition to the initial setup tasks, you need to complete a few other tasks to enable data in the Career Interests and Objectives side panel. For details, see *How do I configure the side panel in Grow?*

The sections on the side panel appear only if there's data to display in those sections and you have the required data security privilege and function security privilege in the products that generate this data.

Additional Set Up for Excel In Your Current Role Tab

In addition to the initial setup tasks, here are the other tasks that need to be completed to enable data in the Excel In Your Current Role tab:

Excel in Your Current Role	Product Requirements	Additional Setup Tasks
Skills assigned by your manager	Learning	This swim lane appears when the ORA_WLF_ENABLE_GROW_RECOMMENDATIONS profile option is set to **Yes** and the data is set up using the Recommendation Profiles application. Administrator task: • Set up learning recommendations using the Recommendation Profiles application (available in **My Client Groups**). For more information, see the topic *Recommend Learning*.
Skills and tasks assigned by your leadership	Learning	Business leader's task: • Create and assign a role guide to the employee. • Each tab in this section represents a capability guide of the role guide. It'll display if you include at least one task that helps achieve a required skill included in the capability guide.
Development resources for your role (Was earlier “Resources to meet job requirements”)	Learning	This swim lane appears when the ORA_WLF_ENABLE_GROW_RECOMMENDATIONS profile option is set to **Yes** and the data is set up using the Recommendation Profiles application. Administrator task: • Set up learning recommendations using the Recommendation Profiles application (available in **My Client Groups**). For more information, see the topic *Recommend Learning*.
Suggested learning for you	Learning	This swim lane will appear instead of the **Skills assigned by your manager** and **Development resources for your role** swim lanes if the ORA_WLF_ENABLE_GROW_RECOMMENDATIONS profile option is set to **No**, and the data is set up using the steps mentioned below. Administrator task: Run the scheduled process, **Recommend the Most Popular Learning**, with the recommendation category: • Recommendations for current job gaps • Recommendations for your manager assigned skills

Excel in Your Current Role	Product Requirements	Additional Setup Tasks
		If any learning items match the criteria specified in this process, those learning items appear here. Or, you can recommend any learning item manually to have it appear in this feed. To do so, follow these steps: 1. Go to **My Client Groups** > **Learning** and select a learning item, **Courses**, for example. 2. On the Courses page, select the course that you want to recommend. 3. Click **Learners** from the side panel, and then select **Recommendation** from the **Add Learners** menu. 4. Select the recommendation category as **Recommendations for current job gaps** or **Recommendations for your manager assigned skills**, and click **Next**. 5. Add the name of the employee, and click **Submit**. These steps trigger the **Process Learning Recommendations** job which creates the learning recommendation.
Your current learning	Learning	Employee task: • Enroll in a learning item. A learning item could be a course, specialization, video, or tutorial. For details on enrolling in a learning item, see the Related Topics section.
Current development journeys	Journeys	Manager or employee task: • You or your manager must create a journey of type Career Development and assign it to you using Journeys. For details on how to create and assign journeys, see the Related Topics section.
Development journey tasks to finish (was earlier called Tasks to finish)	Journeys	Manager or employee task: • You or your manager must create a journey of type Career Development and assign it to you using Journeys. All tasks in this journey category appear here. For details on how to create and assign journeys, see the Related Topics section.
New learning in topics you follow	Learning	Employee task: • Follow a learning community. Click the **Learning topics** link from the side panel in Grow, select the learning community you're interested in, and click the **Follow** icon. Administrator task: • Add featured learning items or new learning items to the learning community followed by the employee. To do so, go to **My Client Groups** > **Learning** > **Communities**. Search for a topic community, open it and click **Catalog** from the side panel. The learning items in this topic community appear. From the shortcut menu (identified by three dots) on the learning item, click **Add to Featured**.
Learning based on your favorite gigs	Learning, Opportunity Marketplace	Employee task: • Choose favorite gigs by clicking the **Gigs** link on the side panel in Grow. Select a gig that you're interested in, and click **Add to Favorites** from the **Actions** menu. Administrator task: • Add skills to the favorite gigs. These skills must match the skills marked as Required in the job profile for the employee's role. Note that even if you've defined a position profile for the employee's role, you need to also define a job profile for this swim lane to display data.

Excel in Your Current Role	Product Requirements	Additional Setup Tasks
		• Ensure that one or more skills added to the favorite gigs are present in the Learning Outcomes section of a learning item. For details on these tasks, see the Related Topics section.
Learning popular with your coworkers	Learning	Administrator task: Run the process, **Recommend the Most Popular Learning**, with the recommendation category, Popular with managers and peers. It's recommended to select the **Recalculate recommendations** checkbox as it considers the learning items completed over the past six months to generate recommendations. If you don't select this checkbox, the process considers learning completions over the past week to generate the recommendations. It's recommended to run this process on a weekly basis. If any learning items match the criteria specified in this process, those learning items appear here. Or, you can recommend any learning item manually to have it appear in this feed. To do so, follow these steps: 1. Go to **My Client Groups** > **Learning** and select a learning item, **Courses**, for example. 2. On the Courses page, select the course that you want to recommend. 3. Click **Learners** from the side panel, and then select **Recommendation** from the **Add Learners** menu. 4. Select the recommendation category as **Popular with managers and peers**, and click **Next**. 5. Add the name of the employee, and click **Submit**. These steps trigger the **Process Learning Recommendations** job which creates the learning recommendation.
Popular in your role > List of learning items	Learning	Administrator task: Run the process, **Recommend the Most Popular Learning**, with the recommendation category, Popular with others in your job. It's recommended to select the **Recalculate recommendations** checkbox as it considers the learning items completed over the past six months to generate recommendations. If you don't select this checkbox, the process considers learning completions over the past week to generate the recommendations. It's recommended to run this process on a weekly basis. If any learning items match the criteria specified in this process, those learning items appear here. Or, you can recommend any learning item manually to have it appear in this feed. To do so, follow these steps: 1. Go to **My Client Groups** > **Learning** and select a learning item, **Courses**, for example. 2. On the Courses page, select the course that you want to recommend. 3. Click **Learners** from the side panel, and then select **Recommendation** from the **Add Learners** menu. 4. Select the recommendation category as **Popular with others in your job**, and click **Next**. 5. Add the name of the employee, and click **Submit**. These steps trigger the **Process Learning Recommendations** job which creates the learning recommendation.
Popular in your role > List of learning topic communities	Learning	Administrator task: Run the process, **Recommend the Most Popular Learning**, with the recommendation category, Topics popular in my role.

<table>
<tr><th>Excel in Your Current Role</th><th>Product Requirements</th><th>Additional Setup Tasks</th></tr>
<tr><td></td><td></td><td>If any topic communities match the criteria specified in this process, those appear here.

Or, you can recommend any topic community manually to have it appear in this list. To do so, follow these steps:

1. Go to My Client Groups > Learning and select Learning Assignments.
2. Select Recommendation from the Add Learners menu.
3. On the Recommend Learning page, click Select Item.
4. Search for the topic community that you want to recommend.
5. Click Add Item on the topic community.
6. Select the recommendation category as Topics popular in my role, and click Next.
7. Add the name of the employee, and click Submit.
These steps trigger the Process Learning Recommendations job which creates the learning recommendation.</td></tr>
<tr><td>Popular in your role > List of skills</td><td>Dynamic Skills</td><td>Administrator task:
• Enable the profile option ORA_HRT_AI_SKILLS_ASSISTANT

This generates skill recommendations based on the employee’s job role in Skills Center. The first 12 skills from these recommendations appear here.</td></tr>
<tr><td>Popular in your role > List of gigs</td><td>Opportunity Marketplace</td><td>• Trending gigs must exist for the employee’s current role in Opportunity Marketplace. Gigs are included in the trending list if least five employees have applied to them or marked them as favorites. The posting date of the gigs must be less than six months from the current date.
• The skills defined in the Skill Center section of the employee's job profile must match the skills in the trending gig. Note that even if you've defined a position profile for the employee's role, you need to also define a job profile for this swim lane to display data.
• The trending gigs with the most number of skill matches appear first in the carousel. Trending gigs without matching skills appear last in the carousel.</td></tr>
<tr><td>Popular in your role > List of development journeys</td><td>Journeys</td><td>• All global journeys of the Career Development category that have been assigned to employees in your organization.</td></tr>
<tr><td>Popular in your role > List of connections</td><td>Connections, Learning

Optional:

Opportunity Marketplace</td><td>• Connections that are marked as favorites by others in the same job role as the employee appear here. If these connections have completed any career development activities such as learning or gigs, they appear here in the order of the most number of activities completed. If these connections are already marked as the employee’s favorites, they won’t appear here.</td></tr>
</table>

Note: In addition to the above setup, these swim lanes will appear only if there’s data to display in them and if the employee has the required data security privilege and function security privilege in the products that generate this data.You can use the Express mode in Oracle Visual Builder Studio to show or hide the swim lanes on this tab. You can also change the order of swim lanes by moving them up or down. For more information, see *How do I show or hide swim lanes in Grow?*. You can show or hide the Feeling Inspired banner using the profile option, ORA_PER_CHK_ORACLE_SEARCH_UI_ENABLED. Setting this to Y at the user or site level displays the banner and setting it to N hides it.

Related Topics

- Recommend Learning
- How You Create Journeys
- How Journeys are Assigned
- Create a Gig Using Opportunity Marketplace
- How do I enable a profile option?

Additional Set Up for Grow Your Career Tab

In addition to the initial setup tasks, here are the other tasks that need to be completed to enable data in the Grow Your Career tab:

Grow Your Career	Product Requirements	Additional Setup Tasks
Skills you're developing to grow your career	Learning, Career Development	Administrator task: • Define a job profile for the employee's career of interest from **My Client Groups** > **Profiles** > **Job Profiles**. Note that even if you've defined a position profile for the career of interest, you need to also have a job profile defined to display data in this swim lane. • Add skills in the Skills Center content section of the job profile and don't mark them as Required. These optional skills will be considered for this feed. • Ensure that one or more of these skills are present in the Learning Outcomes section of a learning item. For details on adding learning outcomes, see the Related Topics section.
Skills and qualifications for the {CAREER_OF_INTEREST} role	Career Development, Learning, Opportunity Marketplace, Dynamic Skills	This swim lane appears when these criteria are met: • The ORA_WLF_ENABLE_GROW_RECOMMENDATIONS profile option is set to **Yes**. • Learning recommendations are set up using the Recommendation Profiles application. Employee task: • Choose careers of your interest. To do so, click the **Careers of interest** link from the side panel in Grow. On the listing page, find a career you're interested in. Click the career role card, and on the career details page, click **Add to Favorites**. Administrator task: • Define a job profile for the employee's career of interest from **My Client Groups** > **Profiles** > **Job Profiles**. Note that even if you've defined a position profile for the career of interest, you need to also have a job profile defined to display data in this swim lane. • Set up learning recommendations using the Recommendation Profiles application (available in **My Client Groups**). For more information, see the topic *Recommend Learning*.

Grow Your Career	Product Requirements	Additional Setup Tasks
Your favorite role guides	Opportunity Marketplace	Employee task: Add a role guide as a favorite. To do so, click the **Careers of interest** link on the left panel. This opens the Opportunity Marketplace application. From here, click a career role card that you're interested in. If there are role guides associated with this career role, you'll see them on the **Role Guides** tab of the career role detail page. You can then click a role guide and add it as a favorite.
Suggested learning for your careers of interest	Career Development, Learning Optional: Opportunity Marketplace, Recruiting, Dynamic Skills	This swim lane appears instead of the **Skills and qualifications for the {CAREER_OF_INTEREST} role** only if the ORA_WLF_ENABLE_GROW_RECOMMENDATIONS profile option is set to **No**, and data is set up using the steps below. Administrator task: • Define a job profile for the employee's career of interest from **My Client Groups** > **Profiles** > **Job Profiles**. Note that even if you've defined a position profile for the career of interest, you need to also have a job profile defined to display data in this swim lane. • Add skills in the Skill Center section of the job profile and mark those skills as Required. • Ensure that one or more of these required skills are present in the Learning Outcomes section of a learning item. For details on adding learning outcomes, see the Related Topics section. Employee task: • Choose careers of your interest. To do so, click the **Careers of interest** link from the side panel in Grow. On the listing page, find a career you're interested in. Click the career role card, and on the career details page, click **Add to Favorites**.
Learning based on your favorite gigs	Opportunity Marketplace, Dynamic Skills, Learning	Employee task: • Choose favorite gigs. Click the **Gigs** link on the side panel in Grow, select a gig that you're interested in and click **Add to Favorites** from the **Actions** menu. Administrator task: • Add skills to the favorite gigs. These skills must match the skills that aren't marked as Required in the employee's job profile. Note that even if you've defined a position profile for the employee's role, you also need to have a job profile defined to display data in this swim lane. • Ensure that one or more skills added to the favorite gigs are present in the Learning Outcomes section of a learning item. For details on these tasks, see the Related Topics section.
Learning to prepare for your favorite jobs	Opportunity Marketplace, Dynamic Skills, Learning	Employee task: • Choose favorite jobs. Click the **Jobs** link on the side panel in Grow, select a job that you're interested in and click **Add to Favorites** from the **Actions** menu. Administrator task: • Add skills to the favorite jobs. The skills added to the job must match the skills that aren't marked as Required in the employee's job profile. Note that even if you've defined a position profile for the employee's role, you also need to have a job profile defined to display data in this swim lane. • Ensure that one or more skills added to the favorite jobs are present in the Learning Outcomes section of a learning item.

<table>
<tr><th>Grow Your Career</th><th>Product Requirements</th><th>Additional Setup Tasks</th></tr>
<tr><td></td><td></td><td>For details on these tasks, see the Related Topics section.</td></tr>
<tr><td>Popular in your careers of interest > List of learning items</td><td>Career Development, Learning</td><td>Employee task:
Choose careers of your interest. To do so, click the Careers of interest link from the side panel in Grow. On the listing page, find a career you're interested in. Click the career role card, and on the career details page, click Add to Favorites.
Administrator task:

Run the process, Recommend the Most Popular Learning, with the recommendation category as: Popular with others in your careers of interest.
It's recommended to select the Recalculate recommendations checkbox as it considers the learning items completed over the past six months to generate recommendations. If you don't select this checkbox, the process considers learning completions over the past week to generate the recommendations.
It's recommended to run this process on a weekly basis.

If any learning items match the criteria specified in this process, those learning items appear here.

Or, you can recommend any learning item manually to have it appear in this feed. To do so, follow these steps:
Go to My Client Groups > Learning and select a learning item, Courses, for example.
On the Courses page, select the course that you want to recommend.
Click Learners from the side panel, and then select Recommendation from the Add Learners menu.
Select the recommendation category as Popular with others in your careers of interest and click Next.
Add the name of the employee and click Submit.
These steps trigger the Process Learning Recommendations job which creates the learning recommendation.</td></tr>
<tr><td>Popular in your careers of interest > List of skills</td><td>Career Development, Dynamic Skills</td><td>Administrator task:
Define a job profile for the employee's career of interest from My Client Groups > Profiles > Job Profiles. Note that even if you've defined a position profile for the career of interest, you need to also have a job profile defined to display data in this swim lane.
Add skills to the Skills Center content section of the job profile. At a minimum, mark one or more skills as Required.
Enable the profile option ORA_HRT_AI_SKILLS_ASSISTANT.</td></tr>
<tr><td>Popular in your careers of interest > List of gigs</td><td>Career Development, Opportunity Marketplace

Optional: Dynamic Skills</td><td>Trending gigs must exist for the employee's career of interest. Gigs are included in the trending list if least five employees have applied to them or marked them as favorites. The posting date of the gig must be less than six months from the current date.
The skills defined in the Skill Center section of the job profile of the career of interest must match the skills in the trending gig. Note that even if you've defined a position profile for the career of interest, you need to also have a job profile defined to display data in this swim lane.
The trending gigs with the most number of skill matches appear first in the carousel. Trending gigs without matching skills appear last in the carousel.</td></tr>
</table>

Grow Your Career	Product Requirements	Additional Setup Tasks
Popular in your careers of interest > List of jobs	Career Development, Opportunity Marketplace, Recruiting	• Trending jobs must exist for the employee's career of interest. Jobs are included in the trending list if least five employees have applied to them or marked them as favorites. The posting date of the job must be less than six months from the current date. • The skills defined in the Skill Center section of the job profile of the career of interest must match the skills in the trending job. Note that even if you've defined a position profile for the career of interest, you need to also have a job profile defined to display data in this swim lane. • The trending jobs with the most number of skill matches appear first in the carousel. Trending jobs without matching skills appear last in the carousel.
Popular in your careers of interest > List of development journeys	Journeys	• All global journeys of the Career Development category that have been assigned to employees in your organization.
Popular in your careers of interest > List of connections	Connections, Learning Optional: Opportunity Marketplace	• Connections that are marked as favorites by others in the same job role as the employee's career of interest appear here. If these connections have completed any career development activities such as learning or gigs, they appear here in the order of the most number of activities completed.

Note: These swim lanes appear only if there's data to display and only if you have the required data security privilege and function security privilege in the products that generate this data. You can use the Express mode in Oracle Visual Builder Studio to show or hide the swim lanes on this tab. You can also change the order of swim lanes by moving them up or down. For more information, see *How do I show or hide swim lanes in Grow?*. You can show or hide the Feeling Inspired banner using the profile option, ORA_PER_CHK_ORACLE_SEARCH_UI_ENABLED. Setting this to Y at the user or site level displays the banner and setting it to N hides it.

Related Topics

- Create a Gig Using Opportunity Marketplace
- Create a Job Using Opportunity Marketplace
- Person Profile Type and Learning Outcomes for Oracle Learning Courses and Specializations
- How do I enable a profile option?

Set Up for Enabling the Grow Banner

You can configure a banner on the Grow page to communicate any recent career development or upskilling campaigns that are configured by the HR Specialist or your organization's leadership. These banners are configured using HCM Communicate for a specific audience. A worker will see the banner if they're part of this audience.

1. Create a filtered list that defines the target audience that can view the banner in Grow. Select the object as **Workers** and subscriber as **HCM Communicate**. For more information on creating a filtered list, see the topic, *Create Filtered Lists.*
2. In the Campaigns app (available as part of HCM Communicate in **My Client Groups** > **Show More**), create a banner post for Grow.
3. Define the audience by selecting the filtered list that you created.
4. Define the details of the banner and select the destination as **Grow**.

5. Create the banner title and message that'll be displayed on the Grow page. Select a dismiss action to appear on the banner or add a custom URL to help users navigate to an external page or application.
6. Preview the banner message and click **Submit** to activate it.

> **Note:** Ensure that the Publish Communicate Posts scheduled process is run for the banner to appear on the Grow page.

Related Topics

- Create a Grow Post

Add Guided Journeys as a Banner

Using Oracle Visual Builder Studio, you can embed a guided journey as a banner on the Grow page.

Guided journeys provide guidance, such as tutorials, company policies, and best practices. For example, a tutorial could be created to provide instructions to an employee on how to complete the tasks in a role guide and that could be added as a guided journey. Clicking the title of the journey will open the tutorial in a panel.

For information on setting up guided journeys as a banner, see *Guided Journeys Configuration Using Page Properties*.

Learning and Development Agents

How to Ingest External Files Containing Skill Data

You can upload files containing skills data into the AI engine using the Skills Library Training agent. This skills data is then used by the Skills Library Enrichment agent to discover and suggest skills to add to your skills library.

For details on configuring and running this agent, see *How do I configure and run the Skills Library Training agent?*

Enrich Your Skills Library

From the 26A upgrade onward, the Skills Library Enrichment agent generates skill suggestions by leveraging free-form skills that are added to HCM in application flows such as Skills Center, Candidate Experience, and Talent Profiles. This enhancement is an efficient way to identify and curate new skills that are added in other areas of HCM and to also manage duplicate skills.

Self-service users, recruiters, and HR specialists might create free-form skills in HCM application flows that aren't present in the Oracle Dynamic Skills Library, Lightcast Skills Library, or any existing custom library. These new skills are now added to an inactive skill catalog called Nonlibrary Skills. You can view this skill catalog from **My Client Groups** > **Profiles** > **Item Catalogs**.

The Skills Library Enrichment agent helps you to curate skills from the Nonlibrary Skills catalog and move them to the skill catalog of your choice. In upgrade 26A, the agent has been simplified with the removal of these fields on the configuration page:

- **Include synonyms for skills**
- **Show in pending review if score more than**
- **Automatically approve if score more than**

Instead, a field called **Minimum usage count** is available, which helps you curate nonlibrary skills that are repeatedly used across HCM application flows.

For example, let's say an employee creates a developing skill in Skills Center (which isn't present in any active skill library) and a manager creates the same skill in a new job profile. This skill will be added only once to the Nonlibrary skill catalog, with its usage count set as 2. When you run the Skills Library Enrichment agent, you can choose to select any nonlibrary skills that are used twice or more across various HCM application flows. Only these skills will be available for you to curate in the Microsoft Excel spreadsheet that's downloaded after the agent completes running. These skills will be moved to the target skill catalog that was specified while configuring the agent. Even if you don't approve a skill in the downloaded spreadsheet, it'll still be moved to the target skill catalog in Pending review status. If you search for it in **Item Catalogs**, it won't be listed as part of the Nonlibrary Skills catalog anymore.

> **Note:** If there were any skills in Pending review status from a previous run of this agent, those skills will also be present in the downloaded Excel sheet. The skills will show as being present in the target catalog that was selected as part of the previous run and continue to be in Pending review status.

For details on configuring and running this version of the agent, see *How do I configure and run the updated Skills Library Enrichment Agent?*

Until the 25D upgrade, the Skills Library Enrichment agent leveraged the power of Oracle AI to help you enrich your skills library.

When this version of the agent is run, Oracle AI reads your existing skills library, understands your organization's skills and qualifications requirements, and suggests new skills based on an analysis of these requirements. Each skill suggestion is assigned a confidence score based on the relevancy of the skill to your organization.

For details on configuring and running this agent, see *How do I configure and run the Skills Library Enrichment Agent?*

Related Topics

- Skill Item Catalogs
- Content Section Properties
- Content Items
- Set Up Desktop Integration for Excel

How to Translate Skills Catalogs

Using the Skills Library Translation agent, you can translate the skills in your custom skills catalog to any language supported by the Oracle HCM application. This agent uses an external translation provider to translate the skills.

For details on configuring and running this agent, see *How do I configure and run the Skills Library Translation agent?*

Enrich Job Profiles with AI Suggested Skills

Enrich job profiles with AI-suggested skills using the Job Skills Enrichment agent. This agent analyzes the job description, job title, skills associated with the job profile, your organization's skills library, and other relevant HCM transactional data, and suggests new or extra skills that are relevant to the job profile.

The skills suggested by AI are added as 'pending' (also known as uncurated), and requires an admin to review and approve them to be added to a job profile.

When a job profile is enriched with relevant skills, the Gap Recommender process compares the skills in an employee's talent profile against the skills defined in the job profile and suggests relevant learning items in Grow to help address these gaps.

Before you run this agent, you need to create a filtered list to identify the jobs that you want to add the suggested skills to. While creating the filtered list, you need to choose a job family, job function, job set, or active jobs, as the filter criteria. The jobs relevant to these categories are then identified as a part of this list. When running the agent, you need to select this filtered list name. If you've included a job function or family in the filtered list, the AI agent suggests relevant skills for each job in that function or family.

For each job, the AI agent looks for an associated job profile and suggests skills for that job profile. If a job profile doesn't exist, it creates one in inactive status, and marks it as 'Needs Review', and adds suggested skills to it. If the job profile already exists, it may also add suggested skills to it. If it does, it will only update it as 'Needs Review', but not change the status to active or inactive. The skills are suggested based on predictive AI or generative AI. Your administrator determines this using the ORA_HRT_SKILL_SUGGESTIONS profile option. The skills are suggested based on the job profiles selected in the filtered list.

When the skill suggestions are made, they have a confidence score based on the relevancy of the skill to the job. You can use this confidence score value to decide which skills should automatically be approved, which ones you want to review and approve or reject, and which not to consider at all.

When you set a confidence score threshold for auto-approval, any skill with a score equal to or above this threshold will be automatically approved and added to a job profile, with a curation status of Yes.

When you set the confidence threshold for a manual review, any skill with a score above this threshold (but below the auto-approval threshold), will be added to the job profile with a curation status of No, which you can then review and approve. Note that skills in this status are only visible to administrators, giving them the ability to review these items either in the Microsoft Excel workbook or from **My Client Groups** > **Profiles** > **Job Profiles**. Any skills with a score below the manual review threshold won't be suggested as part of the Microsoft Excel workbook or added to the job profile for you to review.

You can also limit the total number of skills that can be suggested across both auto-approval and manual review categories. This will select the highest scoring skills across both categories. The number of skills selected will be up to the limit you define.

For details on configuring and running this agent, see *How do I configure and run the Job Skills Enrichment agent?*

Related Topics

- Create Filtered Lists
- Set Up Desktop Integration for Excel
- Recommend Learning
- How do I enable a profile option?
- How do I enable enhanced skill suggestions using generative AI?
- How do I enable enhanced skill suggestions using AI Agents?

Grow Deployment Accelerator

Configure the new Grow Deployment Accelerator agent to automatically add skills to job profiles and learning items and run the recommendation profile task as part of a single process. It can be run for all employees or for a specific group as defined by an HCM filtered list.

This accelerator agent includes the Jobs Skills Enrichment agent, Learning Skills Enrichment agent and the Recommendation Profile process. Each of the tasks are run with minimal inputs to reduce the administrative overload.

This helps in quickly setting up the skills in your environment and employees will start seeing quality recommendations early on.

The Grow Deployment Accelerator agent can be created by clicking **Add** or an existing agent can be rerun by selecting and clicking **Run Agent**.

Before you rerun an agent, you can edit and change all its parameters, except the audience. Any changes to the agent are saved and cascaded to the linked child process rows - the Jobs Skills Enrichment agent, Learning Skills Enrichment agent and the Recommendation Profile process. You can run this agent any number of times by changing its parameters.

The Job Skills Enrichment and Learning Skills Enrichment child agent rows are created under the Learning and Development Agents listing page. These child agent rows created due to the Grow Deployment Accelerator agent and therefore can't be edited or run standalone for ensuring data integrity with the parent process. However, the Recommendation Profile child process can be run independently. It's listed on the Recommendation Profiles page.

When an agent row is deleted, it deletes all the linked child rows it created.

For details on configuring and running this agent, see *How do I configure and run the Grow Deployment Accelerator?*.

Related Topics

- Enrich Job Profiles with AI Suggested Skills
- Learning Skills Enrichment Agents
- Recommend Learning
- Set Profile Option Values

Add Skill Descriptions

You can now add descriptions to all the skills in a skill catalog by using the Skills Library Description agent.

This agent leverages Generative AI to create the descriptions based on the following parameters that might be already defined for a skill in the skill catalog:

- Skill name
- Skill description, if it exists
- Business need (driver) for acquiring the skill
- Domain of the skill
- Business function (capability) associated with the skill

Using the Skills Library Description agent, you can add skill descriptions to any skill catalog except the Lightcast Skills Library. You can select the language in which the descriptions must be added. These languages are available:

- American English
- Spanish
- French
- Arabic
- German
- Portuguese

To create descriptions in a specific language, the skill name and existing descriptions, if any, must already be in that language in the skill catalog. The corresponding language pack must also be installed in the Oracle Fusion Cloud application environment. If your skill catalog has a mix of English and other language skills, descriptions can be created according to their languages, provided those languages are selected while configuring the agent and the language packs are also installed. If a skill name exists in a different language, say French, but you select only English while configuring the agent, the description won't be generated for the French skill.

> **Note:** This agent must not be used to translate skills and their descriptions. If you need to translate them, you must use the Skills Library Translation agent.

For details on configuring and running this agent, see *How do I configure and run the Skills Library Description agent?*

Grow for Employees

View Your Career Interests and Objectives

On the Grow side panel, you can see a consolidated view of interests and objectives that you chose or were chosen for you in other parts of HCM, based on your job or position profile.

You can explore these sections and adjust as you see fit:

- Know your role – This displays your career role details page, which has all the resources and information to help you understand how well you align with your current role.
- Skills – This displays the skills you already have or are interested in developing. You can see the required skills that were added for your position or job in Skills Center. You can also discover more skills relevant for your position or job and add them to your profile. The skills that you chose recently from Skills Center appear first.

  > **Note:** You can rate your skill level by clicking the level-picker icon on the skill chip. Click the **Rating guidance** link to view the description for each skill level from the rating model. Select your skill level and click **Update**.You can update your skill level on any skill chip that appears in Skills Center or pages related to skill details, role guides, your career role or other career roles, and learning item details.

- Learning Topics – This displays learning topic communities that you're following. The most recently followed communities appear first.
- Careers of Interest – Displays the careers you added to favorites. The ones you chose most recently appear first.
- Gigs – Displays your favorite gigs from Opportunity Marketplace. They appear in order of the most recently posted gigs. This list includes only those gigs that were posted less than six months from the current date.

  > **Note:** When you apply to your favorite gig, the gig manager will compare the skills you have against the skills associated with the gig and decide whether to hire you for it. If you're hired for the gig, all the skills associated with the gig will be added to your skill profile on completion of the gig.

- Jobs – Displays your favorite jobs from Opportunity Marketplace. They appear in order of the most recently posted jobs. This list includes only those jobs that were posted less than six months from the current date.
- Connections – Displays your favorite connections for your primary job assignment.

Related Topics

- How do I configure the side panel in Grow?

Know More About Your Role

To know more details about your role, click the **Know your role** button on the side panel in Grow. This displays an enhanced career role detail page that has all the resources and information to help you understand how well you align with your current role.

This page displays your career progression path and the qualifications, skills, and competencies needed for each of the careers on that path. It details the role requirements as defined by HR and by your business and how you're doing in achieving those requirements. You can also find resources that will help you address the requirement gaps.

> **Note:** The **Know Your Role** button is available only if a position profile or job profile has been set up for you.

View Your Career Progression Path

The career role detail page displays the career progression path for your role. You can add one or more careers from this path to your careers of interest.

A few points to consider about the career progression path:

- It's displayed only if it has been defined in the job or position details of that career.
- It lists the next three jobs in the progression hierarchy of the career. Note that you can see only a single progression path for a career.
- Apart from your current role, the other career names shown on the career progression path depends on whether an active job profile or position profile is associated with the career.

View Your Career Role Details

By default, your current role details are displayed across two tabs: **Role Requirements** and **Skills Assigned by Your Leadership**.

Role Requirements

This tab displays details related to your job or position depending on these criteria:

- If you have both position and job profiles defined for your career role, you'll see the details defined for your position.
- If you don't have a position profile defined for your career role, you'll see the details defined for your job.

As part of the details, you'll see a job description, skills, and functional competencies such as such as languages, educational qualifications, accomplishments, licenses and certifications, and so on, that are required and good-to-have for the role.
Skills that you have are listed first, followed by skills that you're yet to achieve. You can also view your skills represented in a spider chart that graphically represents how your current proficiency on skills matches against the target proficiency defined for those skills. You can toggle between the list view and the chart view.

The chart view displays up to 8 skills at a time. If more than 8 skills are defined for your career role, you can select the skills that you want to see by using the drop-down list. By default, the first 8 skills that have the largest skill gap between the target level and your current proficiency level are displayed. The skills are sorted based on the skill gap in descending order.

A few points to note about this chart:

- Only those skills that are defined in a job or position profile are displayed on the chart and available for selection from the drop-down list. This list includes both developed and developing skills.
- If you haven't rated yourself on a skill, it's shown at level zero.
- If a skill doesn't have a target level defined on the job or position profile, it's shown on the chart at level zero.

> **Note:** The target level for a skill is defined in the Minimum Skill Level field in the Skill Center section of a job or position profile. You can provide your self-rating using the enhanced level picker on a skill.

If you're yet to gain any of the functional competencies required for the role, you'll see an option to add it as a goal to your goal plan.

Work requirements such as travel, working hours, and so on will also be listed if they're defined for your role. You'll also see learning suggestions and career ambassadors to help you bridge the skills and qualifications gaps, if any, for your role.

Skills Assigned by Your Leadership

If you've been assigned a role guide by your leadership, you'll see this tab. The purpose of a role guide is to define the requirements of a role for the particular business or organization you're in. The role guide lists the skills that are required to help you excel in your role, tasks that can help you attain those required skills, and other resources recommended by your organization.

A role guide consists of capability guides, which are a collection of related skills. Each capability guide is listed as a separate section on this page. In each section, you can view the skills that you need to possess to become ready for a role and the skills that you need to possess to achieve mastery in the role. If a skill is required for both mastery and readiness, it's listed in both areas.

In the **Tasks to attain required skills** section, you can click the task to expand it and view more details, such as the skills you've attained and not attained. The number of required skills you've attained is also shown. If you've already attained the required skills for a task, it'll be marked as exempted; if you've been assigned a task to achieve a skill and you've completed it, you'll see the task as completed.

On this page, you can also interact with any required skills, changing developing skills to developed, and requesting endorsements for the skill. Further, you can drill into a skill to view its details, including what development resources are available for that particular skill.

Skills Assigned by Your Manager

This tab includes the core skills that are assigned to you by your manager. These skills could be assigned by your immediate manager or other managers in your line manager reporting hierarchy. By default, the tab displays the skills that you're yet to achieve, followed by the skills that you already attained.

Popular Next Careers

View the top 6 popular jobs that others in your career role preferred to move to in the past. By default, this list is displayed for the past 10 years, in the order of the most popular to the least popular. The number of years can be changed by your administrator.

This feature is available only for career roles based on active job profiles and not position profiles. Also, it's available only for your primary work assignment in your career role.

Related Topics

- Display the Know Your Role Button

Explore Your Careers of Interest

For any career role that you're interested in, you can view information that helps you prepare for that role and apply to jobs in that role. You can view the skills and functional competencies required for that role, learning resources and career ambassadors to help you upskill for it, and open jobs available, if any, in that role.

To search for and view career roles, click the **Careers of Interest** link on the side panel. This takes you to the Career Development experience in Opportunity Marketplace, with the **Career Roles** filter applied by default. You can search for career roles from here. You can view AI suggested roles that are based on positions or jobs here.

When you click a career role card from search results, you can view these details:

- The career progression path, if it's defined for the role.
- Job description.
- Required skills for the role: Skills that you have are listed first with a color-coded indicator, followed by skills that you're yet to achieve. You can also view your skills represented in a spider chart that represents how your current proficiency on skills matches against the target proficiency defined for those skills on the career role. The chart view displays up to 8 skills at a time. If more than 8 skills are defined for your career role, you can select the skills that you want to see by using the drop-down list. By default, the first 8 skills that have the largest skill gap between the target level and your current proficiency level are displayed. The skills are sorted based on the skill gap in descending order.
- Competency map that shows the competency gap.
- Functional competencies such as languages, educational qualifications, accomplishments, licenses and certifications, and so on, that are required and good-to-have for the role. If you're yet to gain any of these competencies, you'll see an option to add it as a goal to your goal plan. You can also view the descriptive flexfields that are added to qualifications for the role.
- Work requirements such as travel, working hours, and so on, are displayed in the Additional Information section.
- Learning suggestions and career ambassadors to help you bridge the skills and qualifications gaps required for that role. If no learning resources or career ambassadors are available for the role, this section will be empty.

> **Note:** One or more of the above sections might not be displayed if they're not defined in the job profile or position profile for that role.

You can set favorites to browse these roles again later.

Open jobs for the career role of your interest are displayed on the **Jobs** tab. If no jobs are currently available for the role, this tab will be empty. When the number of open jobs exceeds 12, you can view the rest of the jobs by clicking the **View all jobs** link. This takes you to the **Explore** tab, from where you can search for jobs.

You can view all the role guides associated with a career role, if role guides are defined and associated with jobs or positions relevant to that career role. Click the **Role Guides** tab to view the role guide cards associated with that career. By default, the most recently created role guides are listed on the first row. The role guide card indicates the number of skills that are required for that role guide. You can sort the role guides listed based on their name or the date they were updated. You can also add a role guide to your favorites.

Click a role guide card to view these details about the role guide and to add it to your favorites:

- Description of the role guide
- Capabilities for that role guide with these details:
  - Capability description
  - Skills required to attain that capability
  - Tasks to attain the required skills
  - Additional resources to attain the required skills

Related Topics

- Display Careers of Interest

How Grow Helps in Your Current Role

In the **Excel in Your Current Role** tab, you can view and track the progress of your current learning. You can view suggested learning for your skill set, your careers of interest, and learning topics you're following. This list includes learning that will help your increase competency, add certifications, and so on. From the Grow page, you can navigate to the My Learning and Browse pages in Oracle Learning. Grow also recommends opportunities and resources that are popular among the people in your role. You can see the learning, skills, gigs, development journeys, and connections that are popular. You can navigate to the respective product pages from the Grow page and take action on popular items.

You can see the following swim lanes with the corresponding actions or suggestions to close skill gaps and excel in your role. The display and ordering of a few swim lanes depend on whether the ORA_WLF_ENABLE_GROW_RECOMMENDATIONS profile option is set to **Yes** or **No**. For more information, see *How are Grow swim lanes controlled by the Enable Recommendations profile option?*.

Skills assigned by your manager

If this swim lane appears depending on the profile option setting, it displays resources for skills that your manager has assigned to you to fill skill gaps. You'll see one or more tabs depending on how many skills your manager has assigned. Each tab represents a skill, and the cards that appear below are the learning resources that can help you close the gap.

Skills and tasks assigned by your leadership

This section introduces the tasks included in a role guide that's assigned to you, and they help you achieve the skills required for the role. Each tab in this section represents a capability guide of the role guide. Note that a capability guide tab will be listed here only if it has at least one task that helps achieve a required skill that's included in the capability guide. If you've attained some of the required skills, you will no longer see those tasks associated with those skills.

> **Note:** If there are no tasks in a capability guide, that guide won't be listed here as a tab. If tasks were added to the capability guide, but those tasks don't help achieve required skills (that is, they don't have a required skill as an outcome that updates the person's talent profile), those tasks won't be displayed here. If you want to see all the tasks included in your capability guides, including completed tasks, you can click the **Know Your Role** button to view your career role details page, and click the **Role Guide** tab.

If there are more than three tasks in a capability guide tab, you'll see a **Show more** link that you can click to view the other tasks.

When you view a task, you can see the resource type (whether it's a course or specialization, and so on). You'll see the title of the item and the list of skills that can be attained on completing the item. You'll also see the estimated effort for completing that item. When you expand a task, you'll see the **Enrol** button that takes you to the enrollment details page of the learning item. The **Learn More** button takes you to the catalog details for the learning item.

Development resources for your role

This swim lane was earlier called Resources to meet job requirements. If this swim lane appears depending on the profile option setting, it displays learning resources to help fill gaps in skills and qualifications defined for your job or position profile by Human Resources. Each tab represents a skill or qualification where you have a gap, and the cards that appear below are the learning resources that can help you close the gap.

Your current learning

Learning items that you're enrolled in and haven't completed. Learning items such as courses, specializations, videos, or tutorials appear in this list. Required learning assignments show first, sorted by due date. So you'll see overdue learning items first, followed by learning that's due soonest. Voluntary learning assignments show next, sorted by assigned date, with the most recent assignments appearing first.

Current development journeys

Journeys that are assigned to you, so you can plan what tasks to take on next. There's no predetermined display order for these journeys, so you can review them and plan your next steps.

Development journey tasks to finish

This swim lane was earlier called Tasks to finish. It lists the tasks from the Career Development journeys currently assigned to you. You can see the next set of pending tasks from these journeys and act on them as required.

Suggested learning for you

If this swim lane appears depending on the profile option setting, it displays learning suggestions that can help fill any gaps between the skills defined in your position profile and the skills you've attained. If a position profile doesn't exist, it can help fill skill gaps for your job profile. You'll also see learning suggestions for skills assigned by your manager. In addition to skill gaps, these suggestions also help fill competency, language, certification, membership, education, and honors gaps.

New learning in topics you follow

Learning that was most recently featured in the topic communities you follow appears first, followed by learning that was most recently added to those communities.

Learning based on your favorite gigs

Learning that helps you qualify for your favorite gigs by developing skills that are marked as required for your current role.

Learning popular with your coworkers

Voluntary learning that's completed recently by your manager and peers is considered as popular or trending.

Popular in your role

These are opportunities and resources that others in your role are engaging with or pursuing, so that you can access and take on items that are becoming increasingly popular and relevant for your role.

- Learning courses or specializations that are popular among others in the organization in your job role or job family. Voluntary learning that's completed recently is considered as popular or trending.

- Topic communities that are popular in your job role across the organization.
- Skills suggested for your current job role, specifically based on your job title, ranked by occurrence across the application.
- Gigs that are popular among others and help you develop the skills required by your job role. Gigs are sorted based on the most skills matched against your job role. If there are no required skills in your current role, then the gigs that match your user preferences in Opportunity Marketplace will show, in the order of the most preferences that match.
- All global journeys of the Career Development category that have been assigned to employees in your organization.
- Connections popular with others in your primary job assignment. These are sorted based on those connections who have taken on the most development activities such as learning and gigs.

Note:

- When the profile option ORA_WLF_ENABLE_GROW_RECOMMENDATIONS is enabled, the popular journeys that are displayed in the Popular in your role section will have the same look and feel as learning recommendations cards that expand when you hover on them. When this profile option isn't enabled, the popular journeys cards will retain their previous appearance.
- When you hover over a learning recommendation, it appears as an expanded card with extra information about the learning item, a Get Started button, and a more information icon.

Related Topics

- Why do some learning recommendations appear on the Additional Resources tab and some on their own skill tab?

How Grow Helps with Your Career Growth

On the **Grow Your Career** tab, you can view learning recommendations for your careers of interest and develop the skills you want to attain. You can view the gigs, jobs, and development journeys that are popular among your peers in the same careers of your interest. You can also view the popular connections and start following them to gain insights into the roles you aspire to grow into.

You can see the following swim lanes with the corresponding actions or suggestions to help you work toward your career growth. The display and ordering of a few swim lanes depend on whether the ORA_WLF_ENABLE_GROW_RECOMMENDATIONS profile option is set to **Yes** or **No**. For more information, see *How are Grow swim lanes controlled by the Enable Recommendations profile option?*.

Skills you're developing to grow your career

It displays learning suggestions for one or more of these skills:

- Skills you're interested in and have assigned to yourself
- Skills that aren't marked as required by your manager
- Skills that aren't marked as required for your current role

Skills and qualifications for the {CAREER_OF_INTEREST} role

If this swim lane appears depending on the profile option setting, then this title is repeated for every career role you're interested in. For example, if you're interested in the Security Engineer role, it'll read as **Skills and qualifications for the**

Security Engineer role. Here, you'll see learning recommendations that help you qualify for your careers of interest by filling gaps in your skills and qualifications. They're displayed in the order of learning that can help cover the most gaps.

Your favorite role guides

Displays the role guides that you added as favorites from a career role detail page in Opportunity Marketplace.

Suggested learning for your careers of interest

If this swim lane appears depending on the profile option setting, you'll see learning recommendations that help you qualify for your careers of interest by filling gaps in your skills and qualifications. They're displayed in the order of learning that can help cover the most gaps.

Learning based on your favorite gigs

Learning that helps you qualify for your favorite gigs by developing skills that aren’t marked as required for your current role.

Learning to prepare for your favorite jobs

Learning that helps you qualify for your favorite jobs by developing skills that aren’t marked as required for your current role.

Popular in your careers of interest

These are opportunities and resources that others in your careers of interest are pursuing, so that you can access resources that are becoming increasingly popular and relevant for your careers of interest.

- Learning items that are popular in the job or job family of careers you’re interested in. Voluntary learning that’s completed recently by others with the same job role or family is considered as popular or trending.
- Skills suggested for the careers of interest, ranked by occurrence across the application.
- Gigs that are popular among others in your careers of interest. Gigs are sorted based on the most skills that match against the skills in your careers of interest. If there are no required skills in the careers of interest, then the gigs that match your user preferences in Opportunity Marketplace will show, in the order of the most preferences that match.
- Jobs that are popular among others in your careers of interest. Jobs are sorted based on the most skills that match against the skills in your careers of interest. If there are no required skills in the careers of interest, then the jobs that match your user preferences in Opportunity Marketplace will show, in the order of the most preferences that match.
- All global journeys of the Career Development category that have been assigned to employees in your organization.
- Connections popular with others in job roles that are related to your careers of interest. These are sorted based on those connections who have taken on the most development activities such as learning and gigs.

Note:

- Current learning, current development journeys, and development journeys that might interest you appear in this feed if the administrator has turned them on. They will show the same items as those for your current role.
- When the profile option ORA_WLF_ENABLE_GROW_RECOMMENDATIONS is enabled, the popular journeys that are displayed in the Popular in your careers of interest section will have the same look and feel as learning recommendations cards that expand when you hover on them. When this profile option isn't enabled, the popular journeys cards will retain their previous appearance.
- When you hover over a learning recommendation, it appears as an expanded card with extra information about the learning item, a Get Started button, and a more information icon.

Related Topics

- Why do some learning recommendations appear on the Additional Resources tab and some on their own skill tab?

Grow for Business Leaders

View Role Alignment Progress for Your Team

Using the Role Alignment feature, you can track your team's progress toward completion of role guides, capabilities guides, and their associated skills.

As a business leader, you can:

- View real-time alignment of your team against role guide completions.
- View the progress of your team against the capability guides assigned to them through role guides.
- View the progress of your team in attaining the skills assigned to them through capability guides.
- View details of completion for individuals in a team against a role guide, capability guide, and their skill attainment levels.

Prerequisites

To use this feature, you need to complete a few prerequisite tasks. For details, see *How do I enable the Role Alignment feature?*

Understand Your Team Alignment Toward Role Guides

To view and analyze your team's progress toward role guide completions, go to **My Team** > **Learning** . Click the **Role Alignment** tab. This displays the **Role Guides** subtab by default.

Note: You can use the switcher next to the **Role Alignment** page title to view the alignment progress for the most progressed or least progressed teams.

In the **Organizational alignment by role guides** bar chart, you can view up to top 12 most or least progressed role guides and the current percentage completions for your teams.

When you click a role guide on this chart, you can also view the completion progress for that guide and the skill attainment progress for each skill in the guide in two separate bar charts to the right. These show the progress for up to 6 of your directs and their teams.

When you right-click a bar on these charts, you can:

- View all data, which opens a panel drawer to view the role guide completion by individuals in the team.
- Send an email any of the directs.

> **Note:** You can switch to any of the managers in your hierarchy using the **Switch Team** button and see the role alignment for their teams.

Understand Your Team Alignment Toward Capability Guides

Click the **Capability Guides** subtab to view your team's alignment against capability guides in the **Organizational alignment by capability guides** chart. The top 12 most or least progressed capability guides can be viewed. When you click a capability guide on this chart, you can the completion progress for up to 6 of your directs for that guide. You can also view the skills attainment by your team per capability guide on a separate chart.

Similar to the Role Guides alignment charts, you can perform these actions:

- Switch to any of the managers in your hierarchy using the **Switch Team** button and see the capability guide alignment for their teams.
- Right-click any bar on the two bar charts on the right to:
  - View all data, which opens a panel drawer to view capability guide completion by individuals in a team.
  - Send an email to the direct.

Understand Your Team Alignment Toward Skills

Click the **Skills** subtab to view your team's attainment of skills. The top 12 most or least progressed skills are shown by default in the **Organizational alignment by skills** chart. Clicking on a skill on this chart refreshes the team's attainment progress for that skill. Similar to the role guide and capability guide alignment charts, you can perform other actions such as viewing all data and sending email to an employee by right-clicking the bar charts on the right.

Role Guides

Role guides enable organizational leaders to clearly define role expectations for a segment of employees and help guide those employees to attain the needed skills.

As organizational leaders, you might want to extend the canonical job requirements defined by the Human Resources department to drive upskilling of strategic resource pools to drive market competitiveness. To address this need, you can now create role guides to define the skills that employees must have in order to meet the requirements for their role. In a role guide, you can also include development resources that will help them attain those skills.

Using role guides, you can drive the development of your employees in specific ways that your business requires, without having to push for job architecture changes or changes to job or position definitions shared by other businesses within your company. For example, for a Software Development Manager career role, you can have these role guides:

- Software Development Manager for Business Analytics: Lists the skill requirements for business model analysis capabilities.
- Software Development Manager for Banking Applications: Lists the skill requirements for building secure applications, financial domain knowledge, and risk management.
- Software Development Manager for Machine Learning Applications: Lists the skill requirements for building large scale models and machine learning tool sets.

The following features are provided by role guides:

- You can create the overall definition of a role guide. This includes its description, visibility (who can see the role guide on the Role Guides listing page), and users who are authorized to collaborate on its creation.
- You can define capability guides within a role guide. A capability guide helps you group related skills and add the development tasks that need to be completed to attain the skills required for the role. Skills are categorized as:
  - Required for Role Readiness – Employees need these to become ready for the role.
  - Required for Mastery – Employees need these to achieve mastery in the role.

  You can also add supplemental development resources that could be helpful, but may not necessarily result in skill attainment.
- You can assign the role guide to a target list of workers, based on a predefined filtered list, which enables you to target specific jobs. Based on the worker security privilege of the role guide owner, a scheduled process can be run to assign the role guide to workers who meet the filtered list criteria. This process also reconciles the assignments when workers no longer meet the criteria of the filtered list.
- An assigned role guide will result in displaying a list of outstanding development tasks on an employee's Grow page, in the **Skills and tasks assigned by your leadership** swim lane. Employees can also see the entire role guide on their Know Your Role page on the **Skills Assigned by Your Leadership** tab.
- A role guide can also be associated with either a job or position. When an employee looks at a career role whose associated job or position profile is the same as the job or position the role guide is associated with, they can view this role guide as part of that career role. For example, when they view their career role details in Opportunity Marketplace, they can view the role guide on that page.

Manage Role Guides

To view, add, edit, or remove role guides, go to **My Team** > **Learning**, and click the **Role Guides** tab. Here you'll see a list of role guides, depending on their visibility settings and your access privilege.

From this page, you can search for role guides based on their title or description. You can also filter role guides based on the names of capability guides, or the skills and qualifications that are included in the capability guides.

You can also sort the role guides based on their last updated date or role name.

Clicking the role guide name takes you to the role guide details page. Clicking the capability guide number takes you the list of capability guides included in the role guide.

Create and Activate a Role Guide

The first step in creating a role guide is to provide a name and description for the guide, decide who can collaborate on its creation, and who can see it on the Role Guides listing page.

After you create the role guide, you must activate it for it to be published and used by workers. Until you activate it, it'll be in **Draft** status.

A few points about activating a role guide:

- You can activate it only if you add at least one capability guide.
- You can edit an active role guide. However, when you do so, you'll see a Reconcile banner message. Reconcile the guide if you want the changes to be available to employees who've already been assigned this role guide.
- While you can delete a draft version of the role guide, you can't delete an active version. If you don't want the role guide to be used, remove all assigned users and any associated jobs or positions.

1. Go to **My Team** > **Learning**.
2. Click the **Role Guides** tab.
3. Click **Add**.
4. In the **Basic Info** tab, enter a name and description for the role guide.

   You can click **AI Assist** in the Description box to use generative AI to create a description for the role guide. GenAI will create a description based on the role guide name that you provide. Optionally, you can write a few lines of the description to enable GenAI to generate a description that suits your needs. After the text is generated, you can make further edits, as required. You can show or hide the **AI Assist** button using the **Show AI Assist Button** page property in Oracle Visual Builder Studio.
5. Include the names of the collaborators who might want to coauthor the role guide with you.
6. You can choose to make the role guide visible only to collaborators or to everyone on the Role Guides listing page.
   - Collaborators: Anyone with the WLF_MANAGE_ROLE_GUIDES privilege and identified as a collaborator can see this role guide on the role guides listing page.
   - Everyone: This includes collaborators and non collaborators. Anyone with the WLF_MANAGE_ROLE_GUIDES privilege and identified as a collaborator can see this role guide. Non collaborators can only see the listings and see the role guide in read-only mode.

What to do next

Add capability guides to the role guide.

Related Topics

- How do I control the display of a UI element in Visual Builder Studio?

Add Capability Guides

You can add capability guides to an existing role guide or while creating a new one. To do so, open the role guide from the Role Guides listing page and click the **Capability Guides** tab. You can either create a capability guide from scratch or reuse an existing capability guide.

You can reuse an existing capability guide in one of two ways:

- Reuse it only by reference, which means you can't edit it. Whenever the collaborators or the author of the source capability guide update it, those changes will be reflected in this reused capability guide.
- Make a copy of an existing capability guide and make changes to that copy. However, any changes that the author or collaborators make to the original capability guide won't reflect in your copy.

If you're creating a capability guide from scratch, these are the details you need to provide:

1. Enter a name and description for the capability guide.

   You can click **AI Assist** in the Description box to use generative AI to create a description for the capability guide. GenAI will consider the role guide name, its description if available, and the capability guide name and its description if available, and generate a relevant description based on these. After the text is generated, you can make further edits, as required.

2. Specify how others can reuse the guide. You can also choose not to allow reuse.
3. In the **Days to complete tasks** field, enter how many days an employee (who's assigned the role guide) can take to complete the tasks that are listed in the capability guide to attain the skills in that guide.
4. In the **Required skills** section, add the skills that an employee must attain to fulfill the requirements of the capability guide.

   > **Note:**
   > - If you don't see any skills in this section, check whether you've added Skills Center section to the content section of the Guide Requirements profile type. To check this, go to **My Client Groups** > **Profiles** > **Profile Types**.
   > - The skills that are suggested in this section could be based on predictive AI or generative AI. Your administrator determines this using the ORA_HRT_SKILL_SUGGESTIONS profile option. The skills are suggested based on the capability guide name and description.

5. After adding a skill, edit the skill to add or change skill attributes, such as whether the skill is required for achieving readiness, mastery, or both in the role, the level required for readiness and/or mastery, minimum years of experience required in the skill, importance of the skill, and skill type.

   > **Note:** You must select a value from the **Required For** list. If it's not selected, employees can't see the skill listed on the **Skills Assigned by Your Leadership** tab on their Know Your Role page in Grow.

6. In the **Task to attain required skills** section, search for and add learning courses that will help the employee attain those skills. When you click inside the search box, you'll see a list of suggested learning items that have outcomes that are the same as one or more of the required skills you added. When the employee completes a learning item, their talent profile is updated with these skill outcomes.

   You might also see learning tasks that don't have the same skill outcomes as the ones you added. However, when the role guide is assigned to employees, these tasks won't be assigned to them. The intent of adding these tasks is to allow role guide authors to continue creating the role guide, and later go back to their learning application to add these outcomes to those learning items, or request the learning administrator to add them. In the interim, you'll see a warning that reads **Task doesn't help attain skill**.

7. In the **Resources for required skills** section, search for and add other learning resources that will supplement the learning tasks. The learning items suggested in this search box don't update an employee's talent profile on completion.

What to do next

Assign the role guide to workers.

Related Topics

- Where can employees see role guides?
- How do I enable a profile option?
- How do I enable enhanced skill suggestions using generative AI?
- How do I enable enhanced skill suggestions using AI Agents?

Assign Role Guide to Workers

Assign a role guide to workers so that they can view the role guide when they see their career role page in Grow.

The assigned role guide will be visible on the **Skills Assigned by Your Leadership** tab of their career details page on clicking the **Know Your Role** button in Grow. Also, workers can see the tasks they still need to complete on their Grow page, on the **Skills and tasks assigned by your leadership** swim lane.

When a role guide is assigned to a worker, the associated skills are also assigned to the worker, but the learning tasks aren't assigned. The user must self-enroll into them. This is because there are often many different resources that can be used to attain the same skill.

1. Click the **Assign Workers** tab.
2. Use a filtered list to define the target audience for the role guide:
    - Click **Add** to select from existing filtered lists.
    - Click the **Manage Worker Lists** button to create a new filtered list. For role guide assignments, select the Object as **Workers** and Subscriber as **Grow** when creating a filtered list.
3. In the **When to process assignments** section, schedule a process to assign the role guide to workers on a specific date.

    If changes are made to the role guide, changes to assigned skills or tasks won't take effect until this process has been run. Therefore, schedule it accordingly. This process will also take care of adding and removing workers when they no longer meet the criteria of the filtered list.

What to do next

Associate the role guide to a job or position.

Associate a Role Guide to a Job or Position

Associate the role guide to a job or position, so it can be accessed through the career role details page in Opportunity Marketplace.

When you view a career role from Opportunity Marketplace, the role guide details appear in the **Role Guide** tab of the career role details page, for the job project or position profile that's associated with the same job or position this role guide is associated with.

To associate the role guide to a job or position:

1. Click the **Associate to Career Role** button.
2. From the **Associate to** field, select **Job** or **Position**.
3. Select the job name or position name to associate the role guide to.

What to do next

Activate the role guide. A few points about activating a role guide:

- You can activate it only if you add at least one capability guide.
- You can make changes to an active role guide. However, when you do so, you'll see a Reconcile banner message. Reconcile the guide if you want the changes to be available to employees who've already been assigned this role guide.
- While you can delete a draft version of the role guide, you can't delete an active version. If you don't want the role guide to be used, remove all assigned users and any associated jobs or positions.

Ensure that you run the scheduled process, **ESS job to create index definition and perform initial ingest to OSCS**, with the Index Name to Reingest parameter as **fa-hcm-careerrole**.

Related Topics

- Why should I reconcile a role guide?

5 HCM Communicate

Overview of HCM Communicate

What's HCM Communicate

HCM Communicate provides organizations a powerful way to create, target, and track company communications sent to employees.

Communication teams target their employees with communications, and then send future communications based on employee engagement. Communication teams can send out communications on behalf of others in the organization. HCM Communicate also provides a rich email editor that helps communication teams to quickly create emails with engaging content. Any emails and SMS messages from Communicate are sent directly to the recipient's inbox and SMS organizer.

There are 2 types of users for HCM Communicate:

- Campaign administrators are responsible for configuring HCM Communicate for their organization so that campaign managers can use the application. This involves creating templates for emails and predefined email profiles, audiences, and links used by campaign managers when they set up a communication campaign.
- Campaign managers are responsible for creating and scheduling communication campaigns, defining the purpose and target audience, and creating engaging content to create the best impact for the communication.

Before You Start

HCM Communicate requires a subscription to Fusion HCM Communicate Cloud Service (SKU B95499). You must first subscribe to this service prior to using HCM Communicate.

HCM Communicate is part of Oracle Cloud HCM. Before you start implementing HCM Communicate, you first need to implement this product:

- Oracle Fusion Global Human Resources Cloud Service

HCM Communicate Roles

Here's an overview of various user types and roles required to enable, set up, and use HCM Communicate.

User Type	Roles or Privileges Required	User Capabilities
Administrator	• Application Implementation Consultant (ORA_ASM_APPLICATION_ IMPLEMENTATION_CONSULTANT_JOB) • Human Capital Management Application Administrator (ORA_HRC_HUMAN_	If you're an administrator who needs to create and assign roles to users in your organization, refer to the HCM Communicate Setup chapter. Here are the tasks you can perform: • *Enable HCM Communicate*

User Type	Roles or Privileges Required	User Capabilities
	CAPITAL_MANAGEMENT_APPLICATION_ ADMINISTRATOR_JOB)	• *Assign the Campaign Administrator Role* • *Assign the Campaign Manager Role*
Campaign Administrator	• Employee Campaign Administrator (ORA_IRC_EMPLOYEE_CAMPAIGN_ ADMINISTRATOR_JOB) • Human Capital Management Application Administrator (ORA_HRC_HUMAN_ CAPITAL_MANAGEMENT_APPLICATION_ ADMINISTRATOR_JOB) • Application Implementation Consultant (ORA_ASM_APPLICATION_ IMPLEMENTATION_CONSULTANT_JOB) • Manage All HCM Communicate Campaigns (ORA_IRC_MANAGE_ALL_ HCM_COMMUNICATE_CAMPAIGNS). Optionally add this security privilege to view and manage all campaigns even if you're not the owner or a member of the communication team.	If you're assigned a Campaign Administrator role, refer to the HCM Communicate for Campaign Administrators chapter. Here are the tasks you can perform: • *Create an Email Template* • *Create a Predefined Link* • *Create an Email Sender Profile* • *Create a Predefined Audience Using Eligibility Profiles* • *Create a Communication Team*
Campaign Administrator for Communicate FSM Tasks Only	• Employee Campaign Administrator (ORAIRC_EMPLOYEE_ADMINISTRATOR_ JOB) • Functional Setups User (ORA_ASM_ FUNCTIONAL_SETUPS_USER_ABSTRACT)	If you're a campaign administrator with only these roles assigned, you can access and configure Communicate FSM tasks only. You'll have no access to other functional areas within Setup and Maintenance.
Campaign Manager	• Employee Campaign Manager (ORA_IRC_ EMPLOYEE_CAMPAIGN_MANAGER_JOB) • Use REST Service - Eligibility Object Results for Benefits (ORA_BEN_REST_SERVICE_ACCESS_ELIGIE • Use REST Service - Benefits Lists of Values (BEN_REST_SERVICE_ACCESS_BENEFITS_I • Use REST Service - Eligibility Objects (BEN_REST_SERVICE_ACCESS_ELIGIBILITY For journey related campaigns you need these: • View Global Journeys (PER_VIEW_GLOBAL_JOURNEYS_PRIV) - functional privilege to view journeys • Explore option enabled in the Checklist template in the Security tab	If you're assigned a Campaign Manager role, refer to the HCM Communicate for Campaign Managers chapter. Here are the tasks you can perform: • *Create a General Communication Campaign* • *Create a Get Response Communication Campaign* • *Create a Promote Journey Communication Campaign* • *Select the Audience of a Communication Campaign* • *Create an Email for a Communication Campaign* • *Create a Follow-Up Email for a Communication Campaign* • *Schedule a Communication Email* • *Activate a Communication Campaign*

Security Reference

The tasks that people can do and the data that they can see depend on their roles, duties, and privileges. For more information about these factors, see these two guides:

- *Securing HCM*
- *Securing Reference for HCM*

Introduction to Communication Campaigns

You create a communication campaign to send communications to employees in your organization. Decide whether you want to design an email/SMS campaign, a post campaign, or a grow notification.

With an email/SMS type of campaign, you can use emails and SMS messages to communicate with a target audience. With a post type of campaign, you design posts and publish them to My Activity Center and Grow pages of your preferred audience. With a grow notification, you can send employees an email with details about their recommended learning and a link to their Grow page, on a frequent basis.

HCM Communicate Setup

Enable HCM Communicate

To start using HCM Communicate, you need to enable the HCM Communicate offering and opt-in to its functional areas.

Before you start

To enable HCM Communicate, you need the following roles:

- Application Implementation Consultant (ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB)
- Administrator (ORA_HRC_HUMAN_CAPITAL_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)

Here's what to do

1. Navigate to **Navigator** > **My Enterprise** > **Offerings**.
2. On the Offerings page, click **HCM Communicate**.
3. Click **Opt-in Features**.
4. On the Opt-In: HCM Communicate page, select **Enable** next to HCM Communicate and Employee Communications.
5. Click **Done**.

Results:

The status of HCM Communicate indicates Enabled.

Assign the Campaign Administrator Role

You assign the Campaign Administrator role to a user so they can access and configure the HCM Communicate offering in the Setup and Maintenance work area.

Before you start

To assign a role to a user, you need the following roles:

- Application Implementation Consultant (ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB)
- Administrator (ORA_HRC_HUMAN_CAPITAL_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)

Here's what to do

1. Navigate to **Navigator** > **Tools** > **Security Console**.
2. Click the **Users** tab.
3. Search for the user to whom you want to assign the Campaign Administrator role.
4. On the User Account Details page, click **Edit** to grant the Campaign Administrator role and privileges to the user.
5. On the Edit User Account page, click **Add Role** to add the following roles to the user.
    - ORA_IRC_EMPLOYEE_CAMPAIGN_ADMINISTRATOR_JOB
    - ORA_HRC_HUMAN_CAPITAL_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB
    - ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB
6. Click **Save and Close**.

Results:

The user can now access the HCM Communicate offering in the Setup and Maintenance work area.

What to do next

When you work in a test environment, it's recommended to manually run the Import User and Role Application Security Data scheduled process to ensure that the users are updated. In a production environment, you need to set a schedule to run the scheduled process.

Related Topics

- Scheduled Processes for HCM Communicate
- Create Job Role and Abstract Role from Scratch
- Submit Scheduled Processes and Process Sets

Assign the Campaign Manager Role

You assign the Campaign Manager role to a user so they can access the Communicate application in HCM and create communication campaigns for employees.

Before you start

To assign a role to a user, you need the following roles:

- Application Implementation Consultant (ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB)

- Administrator (ORA_HRC_HUMAN_CAPITAL_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)

Here's what to do

1. Navigate to **Navigator** > **Tools** > **Security Console**.
2. Click the **Roles** tab.
3. On the Roles page, click **Create Role**.
4. On the Create Role: Basic Information page, enter a role name (Campaign Manager), role code, and role category (HCM - Job Roles).
5. Click **Next**.
6. On the Create Role Campaign Manager: Function Security Policies page, click **Add Functional Security Policy** and add these privileges:
    - Use REST Service - Benefits Lists of Values
    - Use REST Service - Eligibility Objects
7. Click **Next**.
8. On the Create Role Campaign Manager: Role Hierarchy page, click **Add Roles** and add these roles.
    - ORA_IRC_EMPLOYEE_CAMPAIGN_MANAGER_JOB
    - ORA_BEN_REST_SERVICE_ACCESS_ELIGIBILITY_OBJECT_RESULTS_FOR_BEN
9. Click **Next**.
10. On the Create Role Campaign Manager: Users page, click **Add User** and add users who are appropriate for the role.
11. Click **Next**.
12. On the Create Role Campaign Manager: Summary page, verify the new role that you created.
13. Click **Save and Close**.

Results:

The user can now access the Communicate application on the HCM home page > My Client Groups.

What to do next

When you work in a test environment, it's recommended to manually run the Import User and Role Application Security Data scheduled process to ensure that the users are updated. In a production environment, you need to set a schedule to run the scheduled process.

Related Topics

- Scheduled Processes for HCM Communicate
- Create Job Role and Abstract Role from Scratch
- Submit Scheduled Processes and Process Sets

Oracle Communicate for Campaign Administrators

Oracle Communicate Setup and Maintenance Tasks

The table lists the setup tasks of the Oracle Communicate offering, which are available in the Employee Communications functional area. You need the Campaign Administrator role to access this functional area.

Task Name	Description	Recommended Help
Manage Email Templates	Task to create email templates so that campaign managers have a selection of visually engaging emails when they create a communication campaign.	*Create an Email Template*
Manage Predefined Links	Task to create predefined links that are available to campaign managers when they create emails for a communication campaign.	*Create a Predefined Link*
Manage Email Profiles	Task to create email sender profiles that are available to campaign managers when they create emails for communication campaigns.	*Create an Email Sender Profile*
Manage Predefined Audience Criteria	Task to use eligibility profiles to create predefined audiences for employee communication campaigns.	*Create a Predefined Audience Using Eligibility Profiles*
Manage Communication Teams	Task to create communication teams with specific campaign managers (a campaign manager can be part of multiple teams). Each communication team has access to a specific set of sender profiles, predefined criteria, and campaign purpose, all of which are configured by the campaign administrator. Campaign managers can then use these predefined configurations when creating communication campaigns.	*Create a Communication Team*
Manage Communicate Media	Task to upload and store images to create a media library. Campaign managers can access these images when creating email communications.	*Upload an Image to the Media Library*

Create an Email Template

You create email templates so that campaign managers have a selection of visually engaging emails when they create a communication campaign.

Campaign managers can use the basic or advanced editor to create content in the email templates. The basic editor uses a rich text format which enables you to design emails quickly. The advanced editor includes more features to personalize the content. These templates reduce time and effort for campaign managers as well as standardize the templates based on your organization's design guidelines.

Before you start

You need the Campaign Administrator role.

Here's what to do

1. In the Setup and Maintenance work area, go to:
    a. Offering: Oracle Communicate
    b. Functional Area: Employee Communications
    c. Task: Manage Email Templates
2. On the Manage Email Templates page, click **Add**.
3. Enter a name for the template.
4. Select **Basic** or **Advanced** in the Email Editor field.
5. Click **Save**.
6. The email editor opens in a new browser tab. This is where you design the content of the email template. You can personalize elements such as background color, background image, branding text, fonts, font colors, rows, columns.
7. In the Predefined Templates field, you can select a blank template or a predefined template. When you select a predefined template, you can use the template as is, or further personalize it to align with your organization's brand and communication needs.
8. Click **Actions** and then **Save** or **Send Test Email**.

Results:

The email template appears on the Manage Email Templates page and its status is Draft.

What to do next

Activate the email template to make it available to campaign managers.

> **Note:** When you do an import or export between the test and production environments, email templates won't be copied over. You will need to create email templates separately in the test environment and the production environment.

Related Topics

- Overview of the Email Designer

Upload an Image to the Media Library

You upload images to the media library so that campaign managers can insert them into email communications.

You can upload and store images in the media library so that they're available to add to email templates and communications.

Before you start

You need the campaign administrator role.

Here's what to do

1. In the Setup and Maintenance work area, go to:
    a. Offering: HCM Communicate
    b. Functional Area: Employee Communications
    c. Task: Manage Communicate Media
2. Select **Add** and then click in the main area to upload.
3. Name the image.

4. Choose **Save and Activate** or **Save and Close**. The save and close option saves the image in draft status. The Save and Activate option saves the image in an active status.

   If you deactivate an image, then it's unavailable to use in future campaigns. Previous campaigns, scheduled campaigns, or campaigns in draft status, can keep the reference to a deactivated image.

What to do next

Campaign managers can insert the active images you uploaded directly into email communications from the media library.

Create a Predefined Link

You can create predefined links to various parts of HCM. These links are available to campaign managers when they create emails for communication campaigns.

Campaign managers can insert a button or link in the email containing a deep link to various parts of HCM. These predefined links reduce time and effort for campaign managers as they can easily reference links while creating email content for campaigns.

Before you start

You need the Campaign Administrator role.

Here's what to do

1. In the Setup and Maintenance work area, go to:
   a. Offering: HCM Communicate
   b. Functional Area: Employee Communications
   c. Task: Manage Predefined Links
2. On the Manage Predefined Links page, click **Add**.
3. On the Create Predefined Link page, enter a name for the link.

   This is the name that the campaign manager will see when selecting it as part of the email creation process.
4. Select a deep link.

   The list contains all deep links enabled in HCM.
5. Click **Save and Close**.

Results:

The predefined link appears on the Manage Predefined Links page and its status is Draft. Before you activate the predefined link, you can test it by clicking the deep link on the Manage Predefined Links page.

What to do next

Activate the predefined link to make it available to campaign managers.

Create an Email Sender Profile

You create email sender profiles that campaign managers can use when they create emails for communication campaigns.

Sender profiles help campaign managers to send emails on behalf of senior management to create impactful communication. When a campaign manager selects a sender profile, these fields are prepopulated:

- From Display Name
- From Email Address
- Reply to Display Name
- Reply to Email Address

Before you start

You need the Campaign Administrator role.

You need to set up a Sender Policy Framework (SPF) policy on your domain to ensure that your outbound email delivers successfully to internal employees. To enable Oracle to send out an email on your behalf, you must set up an SPF policy on your domain as an authentication mechanism. The methods to set up an SPF policy vary from one domain provider to another. For example, v=spf1 include:spf_c.oraclecloud.com ~all. As an example, after this SPF policy changes, the candidate will receive an email with the "from email" being "Vision Inc. Careers" <careers@visioninc.com>

Contact your IT department to add the SPF rule when you want to use the sender profile. You add this rule in your email server to let Oracle's pod email send emails on your behalf.

Here's what to do

1. In the Setup and Maintenance work area, go to:
   a. Offering: HCM Communicate
   b. Functional Area: Employee Communications
   c. Task: Manage Email Profiles.
2. On the Manage Sender Profile page, select the option **Enable Email Profiles**.

   This will display the Sender Profile section when campaign managers create an employee communication.
3. Click **Add**.
4. On the Add Sender Profile Names page, complete these fields:
   - Sender Profile Name: Name of the profile which displays to the campaign administrator and campaign manager. The name must be unique.
   - From Display Name: Name which displays to campaign email recipients indicating who the email is from.
   - From Email Address: Email address which displays to campaign email recipients.
   - Reply to Display Name: Name which displays to campaign email recipients indicating to whom to reply to the email.
   - Reply to Email Address: Email address which displays to campaign email recipients indicating the address for replying to the email.
5. Click **Save and Close**.

Results:

The sender profile appears on the Manage Sender Profiles page. You can use the sender profile when creating a communication team.

Create a Predefined Audience Using Eligibility Profiles

You can use either eligibility profiles or filtered lists to create predefined audiences for employee communication campaigns.

Campaign managers can then use these predefined audiences to maintain control and oversight of the requisite audience for a particular communication. The employee list you generate using an eligibility profile has default filters applied automatically. They are employees or contingent workers, and the primary assignment only. This means that the eligibility profile you use to create a predefined audience will include the primary assignments of employees or contingent workers only.

Before you start

You need the Campaign Administrator role.

Here's what to do

1. In the Setup and Maintenance work area, go to:
    a. Offering: HCM Communicate
    b. Functional Area: Employee Communications
    c. Task: Manage Predefined Audience Criteria
2. On the Manage Predefined Audience Criteria page, click **Create** and select **Create Participant Profile**.
3. On the Create Participant Eligibility Profile page, enter the following info in the Eligibility Profile Definition section:
    - Name: Enter a name for the eligibility profile.
    - Profile Type: This is prefixed as Participant.
    - Profile Usage: Determines the type of objects you can associate with the profile. Select Employee Communications or Global. Selecting Global makes the profile available to multiple business process usages.
    - Description: Enter a description for the eligibility profile.
    - Assignment to Use: This is prefixed as Specific assignment. This will take into consideration all employees who are permanent, on contract, or both.
    - Status: Set it to active so that campaign managers can select this predefined audience when creating an employee communication campaign.
4. In the Eligibility Criteria section, select eligibility criteria and sub criteria. Define the sequence, name, whether you want to exclude the criteria from eligibility, and the criteria start and end dates.
5. Click **Save and Close**.

What to do next

You can use predefined audiences when creating a communication team.

Related Topics

- Create a Predefined Audience Using Filtered Lists
- Eligibility Profiles

Create a Predefined Audience Using Filtered Lists

You can use either filtered lists or eligibility profiles to create predefined audiences for communication campaigns.

Campaign managers can then use these predefined audiences to maintain control and oversight of the requisite audience for a particular communication. The employee list you generate using a filtered list has default filters applied automatically. They are employees or contingent workers or pending workers, and active or suspended or inactive assignments. This means the filtered list you use to create a predefined audience will include the active, suspended, or inactive assignments of employees, contingent workers or pending workers.

Before you start

You need the campaign administrator role.

Here's what to do

1. In My Client Groups, go to Quick Actions and click **Filtered Lists**.
2. On the Filtered Lists page, select **Add** and enter the details for you list.
3. Select **Workers** as the object and **HCM Communicate** as the subscriber.
4. Select the conditions for your list. For example, select **Worker Type** as an attribute, **Is One Of** as the operator, and then **Employee** as the type of worker. The list you create will include everyone in your organization who match these conditions.
5. Click **Create**. The list is then active and available for you to select as an HCM List in HCM Communicate.

Related Topics

- Create a Predefined Audience Using Eligibility Profiles
- Overview of Filtered Lists

Create a Communication Team

You can create communication teams who have access to specific campaign parameters such as email sender profiles, predefined audiences, and campaign purposes while they create communication campaigns.

Campaign managers can then use these predefined configurations when creating communication campaigns. This helps promote a more tailored and secure experience.

Before you start

You need the Campaign Administrator role. If you want to add alternative contact details for email and mobile phone for employees, you need to set the ORA_IRC_COMMUNICATE_CONTACT_PREFERENCE profile option to Yes at site level. This option displays the Contact Order Preference section where you can add, delete, and reorder email and SMS preferences.

Here's what to do

1. In the Setup and Maintenance work area, go to:
    a. Offering: HCM Communicate
    b. Functional Area: Employee Communications
    c. Task: Manage Communication Teams
2. On the Manage Communication Teams page, click **Add**.
3. In the Details section, enter a name and description for the communication team. Select the campaign purpose.
    - General: Select this option for general communications where a response isn't required. For example, a list of holidays.
    - Get Responses: Select this option to solicit a response on a particular subject. For example, asking employees if they prefer to work from home or the office.
    - Promote Journey: Select this option for a journey's related communication campaign. For example, a journey that's already assigned to employees, or to alert employees about a journey.
    - Promote Learning: Select this option to notify learners about a learning campaign. For example, suggest training modules.
    - Select All if you want the communication team to create General, Get Responses, Promote Journey, and Promote Learning communication campaigns.

4. In the Team Members section, add campaign managers within your organization who can use the sender profile and predefined audience configurations defined for this specific team.
5. In the Sender Profile section, select all possible sender profiles that could be used by this communication team when sending out communications to employees. The list contains the sender profiles that you created.
6. In the Audience section, select all possible audiences that could be used by this communication team when sending out communications to employees. The list contains the predefined audiences that you created.
7. In the Email Templates section, select the basic and advanced email templates you want to make available for this communication team. The list contains active templates only.
8. If the Contact Order Preference section is enabled, add up to 3 different email addresses and up to 3 different mobile phone preferences for each communication team.
9. Click **Save and Close**.
10. On the Manage Communications Team page, select the Activate option for the team.

Related Topics

- Add Alternative Contact Details

Configure SMS for Campaigns

Give campaign managers the ability to send an SMS to employees for easy communication. You need to configure a messaging provider so that campaign managers can create and send an SMS.

Before you start

You need an account with Twilio or Syniverse and the campaign administrator role.

Here's what to do

1. In the Setup and Maintenance work area go to:
   a. Offering: HCM Communicate
   b. Functional Area: Employee Communications
   c. Task: Manage SMS Configuration
2. Select the option to **Enable SMS Communications**.
3. In the Manage SMS Configuration page, click **Add**.
4. Enter the basic provider account details.
5. Enter the message length, which is the maximum number of characters that employees can receive as an SMS. If the campaign manager exceeds the character limit, then the application sends the extra characters in an additional SMS.
6. Select the Add footer text in all SMS sent by campaign managers option if you want to add text to the end of an SMS. For example, you can add a note about how to unsubscribe from the SMS message. The footer text isn't visible to the campaign manager.
7. Enter the account details of the provider, Twilio or Syniverse, and contact them for more information.
8. Test the provider's details using the Test Outbound Message button. Enter a mobile number and message, then navigate to the Twilio site and view the message.
9. Click **Save and Close**.
10. Activate the account on the Manage SMS Configuration page.

    You can have multiple SMS messaging providers, but only 1 active provider. The Syniverse integration doesn't provide any SMS capabilities or credits through HCM Communicate directly. It connects into your existing Syniverse services.

Add Alternative Contact Details

Set a preference for a communication team to use alternative contact details for email and mobile phone. These alternative details help members of this communication team if they're responsible for messaging employees that don't have work email or work mobiles.

Before you start

Ensure the administrator sets the ORA_IRC_COMMUNICATE_CONTACT_PREFERENCE profile option to Yes at the site level. This profile option displays the Contact Order Preference section in the Communication Teams page where you can add, delete, and reorder email and SMS preferences. Check your security and privacy policies to ensure you're using fields that are approved by your organization as contact methods. You need the campaign administrator role.

You can set up more contact details and an order of preference for a communication team. The preference order of the contact details determines the order in which the campaign sends a communication. For example, set the order of preference for email to Work, Home, and then Campus. When sending an email communication, the application would look for each employee's work email first, and if they don't have a work email address configured, it would look for their home email and then their campus email.

Here's what to do

1. In the Setup and Maintenance work area, go to:
    a. Offering: HCM Communicate
    b. Functional Area: Employee Communications
    c. Task: Manage Communication Teams
2. Add up to 3 different email addresses and up to 3 different mobile phone preferences for each communication team in the Contact Order Preference section.

    The different types of email and SMS available are configured in core HR.

Create a Grow Notification

Create a grow notification to send learning recommendations to predefined groups of employees.

The notification you create sends an email with information on the 6 latest learning recommendations relevant to the employee and a link to the Grow page. You use the Filtered List module to create a recommendation list with different categories of learning suggestions for employees.

Before you begin

- You need the campaign administrator role.
- Create a HCM list of recommendations using the Filtered List module.
- Schedule the Process HCM Communicate Grow Notifications to run daily to send the grow notifications email to employees.

Here's what to do

1. In My Client Groups, click **Communicate**.
2. Select **Grow Notifications** and then **Add**.
3. Select any additional languages you want to use to send the email notification in, as well as the default language.
4. Select the list of recommendations you want to promote.

5. Select the details for how often and long you want the notification to run and who you want as the sender profile.
6. Click the **Design Email Content** button to access the email editor and make any minor changes.

   If you selected additional languages, you'll see them in the email designer. After creating the email in the default language, translate the email body subject into the additional languages defined on the Grow notification.
7. Click **Submit**.

What happens next?

From the start date, the application sends an email with 6 of the latest learn recommendations to the employee. The notification runs until the end date and for the frequency you set.

For emails created in multiple languages, an employee will receive them in their default language if it matches one of the languages from the Grow notification email. If none of the languages match the employee's default language, the employee will receive the Grow notification email in the default language defined on the notification.

Related Topics

- Scheduled Processes for HCM Communicate
- Overview of Filtered Lists

HCM Communicate for Campaign Managers

Ongoing and One-time Campaigns

You can create either an ongoing or one-time communication campaign. A one-time campaign targets employees once based on certain criteria. An ongoing campaign targets employees on a recurring basis also based on certain criteria.

When you create a General or Get Response communication campaign, you decide whether you want to send out one communication only or whether you want to send out multiple communications to ensure you reach as many people as possible.

A one-time campaign can target employees who meet certain eligibility criteria. You set up an eligibility profile to define a condition, for example, a work location of New York. The campaign evaluates the employees in the organization against this condition and returns a list of employees who meets that condition. This list becomes the audience population of who receives the communication campaign. You can schedule the email communication to run now or in the future. After the primary email is sent out, the audience (based on the eligibility criteria) is frozen.

An ongoing campaign can target employees who meet a certain eligibility criteria and employees who become eligible after the campaign starts. This type of campaign means you can send communications to an expanding audience that meet certain eligibility criteria at a later point in time. You schedule a communication to either send straight away or send in the future. You also enter a date for when you want to stop sending this communication. The campaign runs and continues to send email communications to newly eligible employees until this date. It also continues to send follow-up emails until the final primary email is sent and the number of days after that you specify when setting up follow-ups.

When you schedule a follow-up asset for an ongoing campaign, you can specify how many days after the primary email that you want the employee to receive the follow-up. Depending on when employees meet the eligibility criteria, they can receive primary and follow-up emails on different dates. Employees that become newly eligible will receive the primary communication later than those employees who are eligible on the day the primary email is sent out. Therefore, the newly eligible employees then receive the follow-up email a certain number of days after the primary email.

A process runs daily to identify and target any new people who meet the criteria and haven't already been targeted by this campaign. This process runs for primary and follow up emails.

Related Topics

- Eligibility Profiles

Select the Audience of a Communication Campaign

You define the audience of a communication campaign to target a specific segment of employees for the campaign.

The campaign administrator defines criteria for targeting a segment of employees by using eligibility profiles or filtered lists. For an eligibility profile, the campaign administrator creates it and assigns it to a communication team so that the campaign manager can use it. For a filtered list, you don't need to assign it to a communication team. As long as the campaign administrator creates it in the context of HCM Communicate, then the campaign manager can use it to create a predefined audience. Use either method to create these predefined audiences to target a segment of employees for your communication campaign.

Before you start

You need the Campaign Manager role.

Here's what to do

1. In My Client Groups, click **Communicate**.
2. On the Communicate page, open a communication campaign.
3. Click the **Audience** tab.
4. For journeys related campaigns, you can target the audience in different ways depending on the type of communication goal you selected.
    - Drive journey completion: you target employees already assigned to this journey. You can also use the Journey Audience Filter field to target employees who are assigned to this journey and meet this additional criterion.
    - Promote journey awareness: choose to target an HCM audience and exclude those employees who are assigned to this journey. Or target all employees that meet the audience criteria regardless of whether they're already assigned to this journey.
5. Click **Add** and select either **Eligibility Profile** or **HCM List**. Both options provide a targeted audience based on certain criteria.

    > **Note:** You can't use HCM List for ongoing campaigns or journeys campaigns.

6. Select a predefined audience.
7. Click **Save**.

Results:

The audience breakdown displays. The audience breakdown represents the distribution of employees selected for the campaign in terms of top worker location and top business unit. The audience breakdown is calculated and refreshed once a day. Click **Preview** (for audiences based on eligibility profiles only) in the Audience Breakdown section to see which employees the campaign aims to target and various details about them. For example, work location, business unit, email address, and work mobile number.

What to do next

When you work in a test environment, it's recommended to manually run the Evaluate Campaign Audience scheduled process for the application to populate the audience breakdown. In a production environment, you need to set a schedule to run the scheduled process.

Related Topics

- Scheduled Processes for HCM Communicate
- Submit Scheduled Processes and Process Sets

HCM Communicate for Email and SMS Campaigns

Create a General Communication Campaign

You create a communication campaign to send communications to employees. Create a General communications campaign when you don't need a response. For example, a list of holidays.

Before you start

You need the campaign manager role.

Here's what to do

1. In My Client Groups, click **Communicate**.
2. On the Communicate page, click **Add**.
3. On the Create Employee Communication page, enter basic information such as the name, description, number of the campaign, and the team of campaign managers who have access to this communication campaign.

   A communication team uses predefined audiences and sender profiles. The communications team determines the types of campaign purpose you can select.
4. Select **General** for the campaign's purpose.
5. Select whether you want to run a one-time campaign or an ongoing one. Select Ongoing to continuously send campaign communications to target newly eligible employees.
6. Select the campaign owners, they'll see the campaign in the list of communication campaigns. Each owner has the same privileges as the campaign manager if they have the Campaign Manager role.
7. Click **Save and Close**.

Create a Get Response Communication Campaign

You create a communication campaign to send communications to employees. Create a Get Response communication campaign when you want a response on a particular subject. For example, do employees prefer to work from home or the office.

Before you start

You need the campaign manager role.

Here's what to do

1. In My Client Groups, click **Communicate**.

2. On the Communicate page, click **Add**.
3. On the Create Employee Communication page, enter basic information such as the name, description, number of the campaign, and the team of campaign managers who have access to this communication campaign.

   A communication team uses predefined audiences and sender profiles. The communications team determines the types of campaign purpose you can select.
4. Select whether you want to run a one-time campaign or an ongoing one. Select Ongoing to continuously send campaign communications to target newly eligible employees. Select One-time to target employees who meet a certain eligibility criteria.
5. Select **Get Responses** for the campaign's purpose.
6. When you select Get Responses, provide the following info.
   a. A response summary title to display on the campaign Overview page.
   b. Select **Hide responses** to display the responses to the get response request at an aggregate level. You won't find out the response of a specific audience member. Select **Show responses** to drill down on a response request to understand each audience member's response to the get response request. You can see this info in the Overview tab of a campaign.
   c. In the Response Choices section, click **Add** to add response choices.
   d. Enter a response. For example, I want to work from home, or I want to work from the office. Responses display to employees in the form of a button or link.
   e. Select the **Use Thank You Page** option if you want the application to take employees to a Thank You page after they provide a response.
   f. Enter a URL for the application to open for employees after they provide a response.
7. Select the campaign owners, they'll see the campaign in the list of communication campaigns. Each owner has the same privileges as the campaign manager if they have the campaign manager role.
8. Click **Save and Close**.

Create a Promote Journey Communication Campaign

You create a communication campaign to send communications to employees. Create a Promote Journey communication campaign for a journey's related campaign. For example, a journey that's already assigned to employees, or a journey to alert employees about.

Before you start

You need the campaign manager role.

Here's what to do

1. In My Client Groups, click **Communicate**.
2. On the Communicate page, click **Add**.
3. On the Create Employee Communication page, enter basic information such as the name, description, number of the campaign, and the team of campaign managers who have access to this communication campaign.

   A communication team uses predefined audiences and sender profiles. The communications team determines the types of campaign purpose you can select.
4. Select **Promote Journey** for the campaign's purpose.

5. Select a journey in the Associated Journey region.
    a. Select **Drive journey completion** as the communication goal if the journey you select is already assigned to employees.
    b. Select **Promote journey awareness** as the communication goal if you want to alert employees about the journey, and then they can assign themselves to it.
    c. Enter a date when you want the campaign to target employees from in the Journey Assigned After field. For example, set the date of assignment to today's date. The campaign sends communications to employees who are assigned this journey as of today.
6. Select the campaign owners, they'll see the campaign in the list of communication campaigns. Each owner has the same privileges as the campaign manager if they have the Campaign Manager role.
7. Click **Save and Close**.

Create a Learning Communication Campaign

You create a communication campaign to send communications to employees in your organization. Create a Promote Learning campaign to notify learners about their required or recommended learning.

For example, you can create a learning campaign to suggest training modules, provide links, add details about the course, and encourage your learners to complete the course.

Before you start

You need the learning specialist and campaign manager roles.

Here's what to do

1. In My Client Groups, click **Communicate**.
2. On the Communicate page, click **Create** and then **Email/SMS Campaign**.
3. On the Create Employee Communication page, enter basic information such as the name, description, number of the campaign, and the team of campaign managers who have access to this campaign.

    A communication team uses predefined audiences and sender profiles. The communication team determines the types of campaign purpose you can select.
4. Select a team to work on the campaign and add people from the team as collaborators.
5. Select **Promote Learning** for the campaign's purpose.
6. Select a learning item.
7. Click **Save and Close**.
8. Select your learning campaign.
9. Select the campaign owners, they'll see the campaign in the list of communication campaigns. Each owner has the same privileges as the campaign manager if they have the campaign manager role.
10. Click **Save and Close**.

Create an Email for a Communication Campaign

One of the steps for creating a communication campaign is to create and design emails that are sent to employees.

The first communication you create is called the primary email and it's always sent to the entire audience by default. You can create follow-up emails targeted to the entire audience or a subset of the audience based on the engagement with the primary email (opened emails, unopened emails, clicking a particular response in the case of a Get Response campaign). You can create your own email or use a template as a starting point. The template is useful to enforce consistency in branding and messaging.

Before you start

You need the Campaign Manager role.

Here's what to do

1. In My Client Groups, click **Communicate**.
2. On the Communicate page, open a communication campaign.
3. Click the **Content** tab.
4. Click the **Add** button and select **Email**.
5. In the Sender Profile section, select a predefined sender profile. This populates the following fields:
    - From Display Name
    - From Email Address
    - Reply to Display Name
    - Reply to Email Address
6. In the Emails section, create the primary email to send to the entire audience.
    a. Enter a name for the email. The name is used as the subject of the primary email.
    b. Select a template. You can create your own email using a blank form. With a blank form, you can copy formatted text from an external source and paste it successfully into the email designer editor. You can also select a predefined email and use it as-is or personalize it using the email designer editor.
7. Click **Save**.
8. Select the **Send Test Email** option if you want to send a test email using the sender profile before activating the campaign.

Results:

On clicking the Save button, the email designer opens in a new browser tab. You can keep the content as is or, you can modify the content by adding and configuring elements such as paragraphs, images, headlines. When you position your cursor in an area of the template, menus appear to help you modify the template.

What to do next

For General and Get Response campaigns, after the email communication is sent, you can view specific delivery details by clicking on Email Delivery Details on the actions menu in the Content tab. For example, find out who opened the email and whether or not they clicked on a link, as well as other details such as delivery status and work location.

Related Topics

- Overview of the Email Designer

Create a Follow-Up Email for a Communication Campaign

After you have created and scheduled the primary email for the communication campaign, you can create one or multiple follow-up emails targeted to the entire audience or a subset of the audience based on the engagement with the primary email (opened emails, unopened emails, clicking a particular response in the case of a Get Response campaign).

When you create follow-up emails, the audience targeted is always based on the audience of the primary email (not the audience of the previous email that was sent).

Before you start

You need the Campaign Manager role.

Here's what to do

1. In My Client Groups, click **Communicate**.
2. On the Communicate page, open a communication campaign.
3. Click the **Content** tab.
4. Click the **Add** button and select **Email**.
5. Enter a name for the follow-up email.
6. Select a template. You can create your own email using a blank form. With a blank form, you can copy formatted text from an external source and paste it successfully into the email designer editor. You can also select a predefined email and use it as-is or personalize it using the email design editor.
7. Select the audience. You can select the entire audience defined in the primary email, or you can select the audience who opened or not the primary email. For a Get Response communication campaigns, you can also the audience who provided a response or not.
8. Click **Save**.

Results:

On clicking the Save button, the entered email information is saved and the email designer opens in a new browser tab. You can keep the content as is or, you can modify the content by adding and configuring elements such as paragraphs, images, headlines. When you position your cursor in an area of the template, menus appear to help you modify the template.

Related Topics

- Overview of the Email Designer

Schedule a Communication Email

When you create a communication email, you can schedule emails to send immediately or at a later time.

You can schedule an email when its status is Draft.

Before you start

You need the Campaign Manager role.

Here's what to do

1. In My Client Groups, click **Communicate**.
2. On the Communicate page, open an employee communication.
3. Click the **Content** tab.
4. Select the **Schedule Email** action for the email you want to schedule.
5. On the Schedule Email page, select one of these options:
    a. Send this email now: The email is sent immediately.
    b. Schedule the delivery of this email: Define the date and time when you want the email to be sent.
6. Click **Save and Close**.

Results:

The status of the email is now set to Scheduled.

Create an SMS for a Communication Campaign

Create and send an SMS as part of a communication campaign. Use it to reach employees who don't have access to corporate emails.

Before you start

The campaign administrator needs to configure a messaging provider before you can create an SMS communication campaign. You need the campaign manager role.

Here's what to do

1. In My Client Groups, click **Communicate**.
2. On the Communicate page, open a communication campaign.
3. Click the **Content** tab.
4. Click the **Add** button and select **SMS**.
5. Enter the details for the SMS:
    - SMS Name: displays to the campaign manager on the Content tab.
    - Link Types: select Token, HCM Link or Journey Link. The type of link you choose determines the link options you can select. Choose one of these options to embed into the SMS text:
        - Select Token to choose a token such as Employee First Name.
        - Select HCM Link to choose a predefined link to another HCM page.
        - Select Journey Link to choose a link to a specific journey.
    - Link Options: insert a link or token directly into the message.
    - SMS Text: enter the body of the message.
6. Click **Save**.
7. From the actions menu, select **Schedule SMS**.
8. Choose whether you want to send the SMS straight away or schedule it in the future.
9. Click **Save and Close**.

What to do next

After the SMS communication is sent, you can view specific delivery details by clicking on SMS Delivery Details on the actions menu in the Content tab. For example, find out who received the SMS and the delivery status, as well as other details such as work location and business unit.

Activate a Communication Campaign

After you have created the communication campaign, defined the audience, and scheduled emails, you activate the communication campaign so that scheduled emails are sent to employees.

When you activate a campaign, you can no longer modify the campaign details, schedule, and audience. To do that, you need to use the Redraft Campaign action to put it back to the Draft status.

Before you start

You need the Campaign Manager role.

Here's what to do

1. In My Client Groups, click **Communicate**.
2. On the Communicate page, locate the communication campaign you want to activate.
3. In the Actions menu, select **Activate Campaign**.

Results:

The communication campaign is set to Scheduled. The Overview section in the communication campaign becomes available.

What to do next

When you work in a test environment, it's recommended to manually run the Prepare Campaign Email and Send Campaign Email scheduled processes for the audience to be populated and for the email to be scheduled and sent. In a production environment, you need to set a schedule to run the scheduled process.

Related Topics

- Scheduled Processes for HCM Communicate
- Submit Scheduled Processes and Process Sets

Communication Campaign Metrics

You can view metrics about a communication campaign that measure message success in terms of messages that are opened and links that are clicked.

When a communication campaign is active and the first campaign email is sent, you can view email metrics on the Overview tab of the campaign for each email created and scheduled.

If the campaign purpose is General, the following metrics are provided:

- Number of opened emails and opened rate
- Number of clicked emails and clicked rate

If the campaign purpose is Get Response, the following metrics are provided:

- All the metrics of the General campaign
- Response summary title
- Number of clicks for each of the responses and total responses

When you work in a test environment, it's recommended to manually run the Track Campaign Email Delivery scheduled process. In a production environment, you need to set a schedule to run the scheduled process.

Related Topics

- Scheduled Processes for HCM Communicate
- Submit Scheduled Processes and Process Sets

HCM Communicate for Posts

Create a My Activity Center Post

Create a Post and publish it to the My Activity Center pages of your target employees.

For example, create posts for organizational updates, informative messages, and to-do actions. All posts are one-time campaigns only.

Before you start

You need the campaign manager role.

Here's what to do

1. In My Client Groups, click **Communicate**.
2. On the Communicate page, click **Add** and then **Post**.
3. Add the campaign details.
4. Select a team to work on the campaign and add people from the team as collaborators.
5. Decide on the audience who will see this post, for example, all FTE employees in North America.

   Use eligibility profiles or HCM lists to create predefined audiences for posts.
6. Describe the post and when you want to publish it. Select **My Activity Center** as the destination to publish the post on the employee's My Activity Center page for a specific period using start and end dates.
7. Enter the details you want to appear on the post's banner. For example, enter a title to grab the attention of your audience and a subtitle that offers more information.
8. Optionally add action buttons for employees to select on the banner. You can add 2 types of actions:
   a. Custom: Give employees the option to navigate to an external or predefined link.
   b. Dismiss: Give employees the option to remove the banner from their My Activity Center pages.

   When you define two actions on the banner, the first action is a custom action by default. The second action can either be a custom or dismiss action.
9. Review a preview of the banner and its actions.
10. Submit the post to schedule it.
11. Review the metrics to measure employee engagement, such as unique clicks and views.

Create a Grow Post

Create a grow post and publish it to your employee's Grow page.

For example, create grow posts to inform employees about new activities they can get involved with, tell them about updates to their workplace or provide them with some career opportunities.

All posts are one-time only campaigns.

Before you start

You need the campaign manager role.

Here's what to do

1. In My Clients Groups, click **Communicate**.
2. On the Communicate page, click **Create** and then **Post**.
3. Add the post details.
4. Select a team to work on the campaign and add people as co-owners.
5. Decide who can see the post by selecting either **HCM List** or **Eligibility Profile**. You use eligibility profiles and HCM lists to create predefined audiences for grow posts.
6. Describe the post and when you want to publish it. Select **Grow** as the destination to publish the post on the employee's Grow page for a specific period using start and end dates.
7. Enter the message you want to appear on the person's Grow page. Select the number of actions you want to include and add the link details. For example, for 2 actions, add a link to an external site and a dismiss action for employees to remove the post from their Grow page.
8. Preview the post before you submit and schedule it.
9. Review the metrics to measure employee engagement, such as unique clicks and views.

   Use the Destination and When was the post published search filters to find your grow posts.

Activate a Post Communication Campaign

After you submit the post, it’s scheduled to display on the My Activity Center pages of the target audience for the duration of days you set when creating the post.

If you need to cancel or edit the post after it’s scheduled, then you can select the Delete Campaign option on the Communicate page.

You can still edit these fields in the post even after it's scheduled:

- End date
- Banner title and subtitle
- Action labels

Post Communication Campaign Metrics

View metrics about a post to see how employees interact with the post and measure its success.

When the post's active or complete, you can track employee interactions with the post and analyze overall post interactions. Unique clicks and views of the banner image count towards the metrics on the Post Interactions section. Review the dates for when individual employees viewed the banner when they clicked either the first action or the second action on the banner.

Unpublish a Post Communication Campaign

A post becomes unpublished from an employee's My Activity Center page and the application doesn't gather any further metrics in these circumstances:

- When the date of the post is reached.
- When the employee selects the Dismiss action on the banner.
- When the campaign manager cancels a campaign that's in progress.

Create a Team Post

Create a team post for your team or team members and publish it to their My Activity Center pages.

Use a team post to announce and track critical communications with your employees. For example, send information about a new work policy to the entire organization, or some important location specific updates to a small group of people.

All posts are one-time only campaigns.

Before you start

You need the line manager role.

Here's what to do

1. Select the **Create Team Post** action from the Team Activity Center page or the **Create Team Post** quick action under My Team, click **Communicate**.
2. Decide who you want to send this post to. Either an entire team or organization, or an individual or group of individuals.
3. Select the specific period you want to publish the post using start and end dates.
4. Enter the text you want to appear on the post’s banner and optionally include a link. A Dismiss button is automatically added to the banner for the employee to remove it from their My Activity Center page.
5. Preview the post before you submit and schedule it.
6. Review the metrics to measure employee engagement, such as unique clicks and views.

Scheduled Processes

Scheduled Processes for HCM Communicate

When you're working in a test environment, run scheduled processes manually to ensure emails are sent out and posts are published.

Scheduled Process	When to Run	Who Runs It	Recommended Frequency
Import User and Role Application Security Data	After the Campaign Administrator and Campaign Manager roles have been created and assigned to users within the organization.	Campaign Administrator	Every 24 hours
Refresh HCM Communicate Audience	When creating a communication campaign and selecting the predefined audience, run this process to display the audience breakdown.	Campaign Manager	Every 24 hours
Prepare Campaign Email	After a campaign is activated.	Campaign Manager	Every 30 minutes
Send Campaign Email	After a campaign is activated, and after successfully running the Prepare Campaign Email process.	Campaign Manager	Every 30 minutes
Track Campaign Email Delivery	After an email was sent out.	Campaign Manager	Every 30 minutes
Publish Communicate Posts	When you submit a post for publishing.	Campaign Administrator	Every 24 hours
Process HCM Communicate Grow Notifications	When you create a grow notification.	Campaign Administrator	Every 24 hours

Related Topics

- Submit Scheduled Processes and Process Sets

Email Designer

Overview of the Email Designer

With the email designer, you can design the content of email templates and emails used in communication campaigns by adding elements such as paragraphs, images, headline, background color, buttons.

As a campaign manager, you create employee email communications using an email editor. Create your own emails using a blank form or use a template as a starting point. When you create an email using a blank form, you can copy formatted text from an external source and paste it successfully into the email editor. The designer retains all the formatting such as carriage return, font size, type, and color, italics, underline, bullet and numbered lists. Recipients of the emails see the text in the same format as in the email editor.

The email designer displays these details:

- Email: Displays the name of the email currently being designed. The drop down displays all emails created for a specific communication campaign.
- Template: The template selected to create the email. You can select another template or a blank form to create the email from scratch. The templates available to you depend on which templates are selected in your communication team.
- Subject: This is the subject appearing in the Subject field of the email.

- Background Color: By default, the background color for the email is white. You can change the color.

These widgets help you design the email.

- Paragraph:
  - Enter text and format it with several formatting options.
  - Copy and paste text and images from MS Word and Google Docs.
- Image:
  - Add images to the email.
  - Enter the URL where the image is located or select an image from the media library.
  - Define the width, height, background color, and alignment of the image.
- Rule:
  - Add rules to create partitions between various sections of the email.
  - Define the rule color, width, alignment, and background color.
- Headline:
  - Add a headline to the email by entering headline text.
  - Define the text color, text style, background color, and align the text.
  - Add links and tokens such as First Name, Last Name, Full Name and Email Address.
- Button:
  - Add buttons and links to the email to obtain responses from employees.
  - Define if the button or link will use an external or a predefined link by the campaign administrator.
  - Enter text to appear on the button or link.
  - Track clicks.
- Space: Add space between various sections of the email.

While designing the email, you can add, move, and delete sections and add predefined column layouts.

Related Topics

- Upload an Image to the Media Library

Pixel Tracking in HCM Communicate

HCM Communicate uses tracking pixel on emails to gather information and track useful metrics about email opens and clicks.

A tracking pixel is a graphic with dimensions of 1x1 pixel that's loaded when an email is sent out to an employee. The Tracking Pixel feature in HCM Communicate supports image pixels that are just image tags. The tracking pixels are embedded by default in emails and you don’t have to do anything to enable it. If tracking pixels aren’t supported in your environment, then employees can manually click on the download image for the pixel tracking to work and provide accurate metrics with regards to opens and clicks.

6 Touchpoints

Overview of Touchpoints

Introduction to Touchpoints

Oracle Fusion Cloud Touchpoints is an employee engagement and experience application that enables continuous and meaningful employee-manager conversations driven by HCM signals and employee sentiment. This helps managers stay in tune with their employee's work experience, enables them to be better communicators and coaches, and helps them foster employee growth.

Touchpoints also provides various interaction channels between the manager and employee, which helps establish an ongoing communication channel between them. This gives them opportunities to recognize achievements, share feedback, and schedule one-on-one check-ins on a recurring basis. These help to boost engagement levels within the team and create a positive and productive work environment.

As a manager, you can:

- Understand the level of interaction in your team in terms of check-ins scheduled, awards and recognitions sent to employees, and feedback given to them.
- Use pulse surveys to understand employee sentiment on a periodic basis and encourage employees to share their thoughts.
- View real-time insights into your team's sentiment, your extended team's sentiment, and organization's sentiment through pulse survey scores. You can also view pulse score trends for multiple surveys that might be assigned to your team.
- Receive personalized nudges for each employee that enables you to provide timely feedback, send a note of recognition, support them with their goals, and more.
- Schedule recurring check-in meetings with employees to provide guidance and feedback.
- Add agenda topics of your choice to these meetings. You can choose from personalized discussion topics recommended by Generative AI that are geared toward an employee's career development. You can also choose to add skill, goal, or competency-based discussion topics. You might also see discussion topics generated by nudges, such as overdue or pending check-ins, low employee sentiment from a recent pulse survey, or gaps in an employee's work progress, which you can add to the check-in.
- Recognize and award employees for their achievements or important milestones.
- Provide timely feedback and also request feedback from others.
- View past and upcoming events and interactions with employees for 12 months in the past and 6 months into the future.

As an employee, you can:

- Voice your opinions through the pulse surveys assigned to you.
- View your pulse score trends over a period of time.
- View past events and interactions and upcoming check-ins with your manager and others in the organization.

- Schedule recurring check-in meetings with your manager. You can add your own topics of discussion to these meetings. You can also add general topics recommended by generative AI or add other topics that are related to your development and performance goals, skills, competencies, or feedback that you've received.
- View upcoming check-ins scheduled by your manager or others in the organization.
- Send feedback or request feedback from your manager and others in the organization.
- Recognize your colleagues to appreciate their achievements.

Note: Oracle Touchpoints and HR Celebrate are sold as a single SKU.

Overview of Touchpoints Features

Here's a closer look at some key features in Oracle Touchpoints.

Events and Interactions

Touchpoints enables managers and their direct reports and dotted-line reports to interact with each other in ways that enable increased engagement. They can interact with each other by scheduling check-in meetings, sending feedback messages, or sending recognitions and awards for personal milestones or achievements.

These events and interactions are displayed in a timeline view and as a list view on the employee's Touchpoints page.

Engagement Metrics

Touchpoints provides managers and matrix managers with the following metrics that help them gain insights into their team's overall satisfaction and engagement levels. They can use these metrics to gain a better understanding of the efforts taken to improve engagement levels within their immediate hierarchy and in the rest of the organization. These metrics include data about all assignments that direct and dotted-line reports might have with the manager.

Metric	Description
Team - Average Interactions	This is the average number of interactions between a manager and their direct reports and dotted-line reports in the past 90 days. This analytic is calculated as the total number of interactions divided by the total number of reports who've had at least one interaction in the last 90 days. The total number of interactions include: • Recognitions received by all the direct reports and dotted-line reports of the manager. • Awards received by all the direct reports of the manager. • Anytime feedback that the manager's direct reports and dotted-line reports have received. • All feedback requested by the manager and their direct or dotted-line reports. • All check-ins that have been held with the manager's direct and dotted-line reports. Check-ins include both Touchpoints and Performance check-ins.
Organization – Average Interactions	This is the average number of interactions between all managers and their direct reports and dotted-line reports in the entire organization over the past 90 days. This analytic is calculated as the total number of interactions across the organization divided by the total number of employees who've had at least one interaction in the last 90 days. The total number of interactions include:

Metric	Description
	• Recognitions received by all the direct, indirect, and dotted-line reports of all managers in the organization • Awards received by all the direct reports and indirect reports of all managers in the organization • Anytime feedback that all direct reports, indirect reports, and dotted-line reports have received • Feedback requested by all direct reports, indirect reports, or dotted-line reports • All check-ins that have been held with all direct reports, indirect reports, and dotted-line reports Check-ins include both Touchpoints and Performance check-ins.
Team – Average Check-ins	This is the average number of check-ins that have been scheduled with a manager's direct reports and dotted-line reports over the past 90 days. This analytic is calculated as the total number of check-ins scheduled with reports in the last 90 days divided by the total number of reports who've had at least one check-in the last 90 days. Check-ins include both Touchpoints and Performance check-ins.
Organization – Average Check-ins	This is the average number of check-ins between all managers and their direct reports and dotted-line reports in the entire organization over the past 90 days. This analytic is calculated as the total number of check-ins scheduled with all employees in the last 90 days divided by the total number of employees who've had at least one check-in the last 90 days. Check-ins include both Touchpoints and Performance check-ins.
Interactions bar chart	This chart displays the number of check-ins that have been scheduled with each employee in a manager's team, and the number of feedback, awards, and recognitions received by them in the last 90 days. These are displayed as stacked bars for each employee. This chart can also be viewed as a list. To do so, click any bar and select **See list view**. This opens up a panel that displays the number of interactions for each employee, along with the team and organization averages. **Note:** This bar chart lists the first 10 direct reports. Data for the remaining reports can be seen using the list view.
Pulse score comparison graph	This graph enables managers to analyze pulse trends over a period of time for three groups of employees: direct reports and dotted-line reports, indirect reports (who are downstream in the organization hierarchy), and all employees in the organization. It displays pulse score averages for every survey that's assigned to each group. The analytic is calculated as the sum of all the pulse scores for each group divided by the total number of employees in that group that responded to the pulse survey. This graph displays the pulse score averages over a period of time. This period depends on the analysis period of the survey. If the analysis period is 2 months, then the survey scores are displayed for the past two months (from the current date). For example, if the survey has been running once a month for the last six months, only the last two months' data will be displayed. **Note:** The x-axis on the pulse score comparison chart shows the survey end date for each frequency.
Low pulse scores	These are individual pulse scores for a manager's direct reports and dotted-line reports, which are computed based on the pulse survey completed by each employee. The lowest pulse scores are displayed first in this section.

Metric	Description
	The pulse score is defined and calculated through the scoring option set on the survey questionnaire. The threshold value for deciding low scores is configured in the **Schedule Allocation** tab of the survey configuration. If pulse scores fall below this threshold, they're considered as low. This section also displays the assignment name for each employee.

Note: Pulse survey metrics are displayed only if one or more employees have completed the survey.

Nudges

Touchpoints encourages managers and employees to improve overall employee engagement and interactions between the manager and the employee through nudges.

Nudges are personalized actionable recommendations. They're displayed as recommended actions on the employee Touchpoints page, as recommended insights topics on check-in pages, and through email notifications. They're designed to capture relevant details about an employee, such as their sentiment and engagement levels, goals, personal milestones, achievements, and so on. Based on these details, timely information is delivered to the employee or manager, which encourages them to take actions that support increased engagement and interactions.

Nudges include the following:

Nudge Reason	Purpose
Employee's anniversary is approaching	Encourages the manager to recognize an employee’s work anniversary
Employee's birthday is approaching	Encourages the manager to recognize an employee’s birthday
Manager hasn’t provided anytime feedback to an employee for a period of time	Encourages the manager to provide feedback to an employee
Check-in between a manager and employee hasn't been scheduled for a period of time	Encourages the manager to schedule more regular check-ins with an employee
Check-in between manager and employee is approaching	Prepares the employee and manager for an upcoming check-in
Employee has performance goals that are later than the target completion date	Encourages the manager to support an employee whose performance goals are later than the target completion date
Employee has performance goals that are due soon but goal completion percentage is less than a defined percentage	Encourages the employee to discuss with the manager about performance goals that need to be updated or are at risk of not being completed
Employee has performance goals with a past goal start date and a status of Not Started	Encourages the manager to coach the employee on keeping performance goals up to date
Employee has high priority aligned performance goals that are due soon	Encourages the manager to track the employee’s progress on high priority performance goals
Employee completes performance goals ahead of the target completion date	Encourages the manager to recognize an employee’s accomplishment when they complete performance goals ahead of the target schedule

Nudge Reason	Purpose
Employee has a low pulse score	Encourages the manager to track an employee's sentiment when their pulse score is below a threshold value
Employee has a low response rate to the pulse survey	Encourages the employee and the manager to improve the employee's participation in pulse surveys

Nudges are configured in the Nudge Configuration work area in **My Client Groups** > **Employment**. For more information, see *Define Touchpoints Nudges*.

Configure Touchpoints

User Roles and Privileges for Touchpoints

To access all Touchpoints features that are applicable to them, managers and employees need to have the appropriate user roles.

Duty Roles	Job or Abstract Role
Access Touchpoints by Worker ORA_HRE_ACCESS_TOUCHPOINTS_BY_WORKER	Employee Contingent Worker
Access Touchpoints by Manager ORA_HRE_ACCESS_TOUCHPOINTS_BY_MANAGER	Line Manager
ORA_PER_HUMAN_RESOURCE_SPECIALIST_JOB	Human Resource Specialist

Nudges

The Administrator needs to have the Nudge Configuration duty role (ORA_PER_NUDGE_CONFIGURATION_DUTY) to configure nudges.

Recognitions and Awards

Managers and employees need to have the same user roles and privileges as Oracle Celebrate to access the recognitions and awards feature in Touchpoints:

- To access the award feature, they need to have the Access HCM Celebrate Manager Dashboard privilege (CEL_ACCESS_MANAGER_DASHBOARD_PRIV).
- To access the recognition feature, they need to have the Access HCM Celebrate Social Feed privilege (CEL_ACCESS_SOCIAL_FEED_PRIV).

- To send recognitions, the employee needs to have the Access HCM Celebrate Social Feed (ORA_CEL_ACCESS_SOCIAL_FEED) aggregate privilege.
- To send an award, the manager needs to have the Award People (CEL_AWARD_PEOPLE) function security privilege.

Check-In Options

An employee (worker) must have the HRA_MANAGE_CHECK_IN_DOCUMENT_PRIV privilege to create check-ins. Even though an employee may be assigned the role options to create check-ins, they must have this privilege to create one.

Related Topics

- Role-Based Security
- Role Types

Profile Option for Enabling Touchpoints

To use Touchpoints, enable the following profile options:

Profile Option Code	Profile Option Name
ORA_HRE_ENABLE_TOUCHPOINTS	Enable Oracle Touchpoints

To enable this option:

1. Go to the Setup and Maintenance work area.
2. Search for and select the **Manage Administrator Profile Values** task.
3. Search for the required profile options.
4. Set the Profile Value field to **Y**.
5. Click **Save and Close**.

Prerequisites for Using Touchpoints

Configure a Touchpoints Check-In Template

Before you can schedule a Touchpoints check-in, you need to configure a Touchpoints check-in template using Performance Management and set it to active. While configuring the check-in template, you can include skills, competencies and questionnaire sections for workers and managers to be added as discussion topics.

Some points to consider while configuring the check-in template:

- Only one Touchpoints check-in template is active at any given time.
- The review period isn't relevant when defining the template. So use the **All Review Periods** option when defining it.
- Eligibility profile isn't relevant when defining the template. It doesn’t appear when you select the Touchpoints template type.
- If your current template doesn’t have questionnaires, and you want to include them in future check-ins, you can’t edit the template. You must create a new template, add the questionnaires, and make it active.

- If your current template already has questionnaires configured and you want to change the questionnaires or exclude them from the template, you must configure a new template with these changes and make it active. You can't edit the current template to make these changes.
- When you make a new template active, the earlier template will automatically become inactive. This inactive template will still show as "In Use" if any check-ins were created from it before.
- If questionnaires were included in the earlier template and are now excluded from the new template, any check-ins created based on the earlier template will continue to display those questionnaires. Only new check-ins created hereafter won't display them. The same behavior applies to changed questionnaires as well. This applies to one-time check-ins and recurring check-ins (which include checks-in scheduled in the past and in future).
- Questionnaires can be marked as done, just like other discussion topics. When they're marked as done, they're included in the completed discussion topic count in the Events and Interactions timeline.
- If you update the check-in template to remove skills as discussion topics, it won't remove existing skill discussion topics in check-in documents that are already created. But it won't be possible to create skill discussion topics in new check-ins.
- If you update the check-in template to remove competencies as discussion topics, it won't remove existing competency discussion topics in check-in documents that are already created. But it won't be possible to create competency discussion topics in new check-ins.

To configure the Touchpoints check-in template to include questionnaires, skills, or competencies, you must use the Redwood version of the Check-in Templates task. To use this version, enable the profile option ORA_HRA_SETUP_REDWOOD_ENABLED.

To configure the template:

1. Go to **My Client Groups** > **Performance** > **Check-in Templates**.
2. Click **Add** to create a new Touchpoints check-in template.
3. Select the template type as **Touchpoints**.
4. Enter a name for the template and set its status to **Active**.
5. By default, Touchpoints check-ins created from this template will be displayed in the employee's performance document. To change this setting, unselect the **Include in performance document** checkbox.
6. The **Check-in content** section displays the list of discussion topic types that you can include in a Touchpoints check-in. To include questionnaires, select the **Questionnaire** checkbox and then select the respective questionnaires for employees and managers.
7. Select any other discussion topic type such as goals, skills, feedback, or competencies that you want to add to the template.
8. In the **Suggested discussion topics** section, select the types of discussion topics to display on the **Suggestions** tab. You can add these topic types: AI-suggested general topics, topics based on nudges, or topics that weren't marked as discussed (open topics) in previous check-ins.
9. For open topics, you can also specify the past number of months to consider while transferring open topics to a new check-in. You can enter up to a maximum of 12 months.
10. In the **Suggested actions based on check-in discussion** section, select whether you want to display performance goals, development goals, or both as follow-up actions after a check-in discussion is over.
11. Click **Submit**.

Note: Once a check-in template is created, any changes made to it after it's created doesn't impact check-ins that were previously created from it. The changes made will apply only to new check-ins created afterwards.

Related Topics

- Create a Check-In Template

Create and Assign a Touchpoints Survey

These are the steps to create and configure a Touchpoints survey and assign it to employees:

1. *Create the questionnaire for the survey*.
2. Create and configure the survey. It includes these subtasks:
   a. *Creating the survey journey*.
   b. *Associating the questionnaire with the survey journey*.
   c. *Specifying the attributes of the survey, such as its frequency, analysis period, and threshold score*.
   d. *Configuring notifications for survey assignments*.
3. *Assign the survey to employees*.

Create the Questionnaire for a Touchpoints Survey

You create the questionnaire used in a Touchpoints survey by using the Questionnaires application.

Here are a few points to consider while creating it:

- Before creating a questionnaire, you must create a questionnaire template. The subscriber name must be Touchpoints.
- By default, a predefined questionnaire template, **Touchpoints Pulse Survey Template**, and a questionnaire, **Touchpoints Pulse Survey Questionnaire**, are available for use, with a sample question that you can edit.
- Always ensure that you select the scoring option for both the questionnaire and the question. Define question scoring according to your business needs.

> **Note:** If you don't score the questionnaire, scores won't be calculated and the pulse survey graph can't be plotted.

1. Go to the Setup and Maintenance work area, and select these options:
   - Setup: **Workforce Development**
   - Functional Area: **Questionnaires**
   - Task: **Questionnaires**
2. Select the **Touchpoints** subscriber.

   You'll see the predefined questionnaire, **Touchpoints Pulse Survey Questionnaire**, in Draft status, with a sample question. You can either make a copy of this questionnaire, or search for the questionnaire template, **Touchpoints Pulse Survey Template**, and create a questionnaire based on this template.
3. On the Create Questionnaire page or Edit Questionnaire page, specify the details as per your business needs in the respective fields. A few points to note:
   a. It's recommended that you select the overall score calculation rule as **Sum**.
   b. Set the status of the questionnaire to **Active**.
   c. The **Score Questionnaire** checkbox is selected by default, because this is based on the Touchpoints template. Leave this checkbox selected.
   d. Select a pagination option from the **Display Format** list. If you choose to display one section per page, section instructions, if any, appear below the section title. When you display all questions on a single page, questionnaire instructions and section instructions appear below the respective titles.
4. Click **Next**.
5. In the Questions section, you'll see a default question that's available as part of the template. You can edit this question and create more questions that you need. Ensure that each question that you create is scored.

6. After you've added the questions that you need, click **Next**.
7. Click **Preview** to view the questionnaire.

   > **Note:** If you've chosen to display the answer options for single-choice and multiple-choice questions as a set of horizontal buttons, these answer options appear in a drop-down list when you preview the questionnaire in an application that's not based on Visual Builder Studio. However, when you view the survey in the Journeys application, you can see the horizontal buttons and the question display format that you've chosen.

8. Click **Save and Close**.

Related Topics

- How You Create Questions
- What happens if I edit a questionnaire that's in use?

Create a Touchpoints Survey Journey

The Touchpoints survey is a type of survey journey that's created using the Checklist Templates task.

1. Go to **My Client Groups** > **Quick Actions** > **Show More** > **Checklist Templates**.
2. Click **Create**.
3. Complete the fields as shown in this table.

Field	Description
Name	Enter a name for the survey journey.
Code	The code is auto-populated. You can change it if required.
Country	For information purposes, select the country to which the survey is applicable. This doesn't filter the survey based on the country.
Category	Select **Survey**.
Survey Subtype	Select **Touchpoints**.
Archive After Months	The survey journey is archived for a number of months after its expiration or completion by the employee or HR specialist. When a survey journey is archived, it no longer appears in the application. But it's still present in the archive tables in the database. **Note:** The responses provided by employees to survey questions aren't archived. They're available in the database for reporting purposes.
Purge After Months	The archived survey journey is purged for a number of months after its expiration or completion by the employee or HR specialist.

Field	Description
	Purged survey journeys are permanently removed from the archive tables. **Note:** The responses provided by employees to survey questions aren't purged. They're available in the database for reporting purposes.

4. Click **OK**.
5. Review the details on the **General** tab. Edit the other details as required. You can enter the effective start and end dates for the survey journey configuration.
6. To finalize the survey journey and use it immediately, set its status to **Active**. Otherwise set it to **Draft**.
7. Click **Save**.

Associate the Questionnaire With the Touchpoints Survey

The next step in the Touchpoints survey creation process is to associate the questionnaire with the Touchpoints survey journey. A Touchpoints survey can have only one task.

1. On the **Tasks** tab of the Checklist page, click the **Create Task** icon.
2. Complete the fields as shown in this table.

Field	Description
Name	Enter a name for the task.
Code	The code is auto-populated. You can change it if required.
Status	The status is auto-populated. You can change it if required.
Description	Enter a description of the survey questionnaire.
Task Type	The default is **Survey**. Leave as is.
Questionnaire	Select the questionnaire to be used in the survey.

3. Click **Save and Close**.

Configure the Survey Frequency and Other Attributes

While creating the survey, you specify its recurrence frequency, that is, when it should start and end and how many times it should run within a specific period. In addition, you also need to specify the analysis period and threshold score of the survey.

1. Click the **Schedule Allocation** tab on the Checklist page.

2. Select the recurrence frequency of the survey in the **Repeat** field. Complete the fields for each survey frequency as shown in these tables.
    - Daily frequency

Field	Description	Next step
Start On	Enter the start date of the survey.	
Repeat	Select **Day**.	
End Recurrence	Option 1: End the survey after a specific number of occurrences.	Enter the number of occurrences.
	Option 2: End the survey on a specific date.	Enter the end date.

    - Monthly frequency

Field	Description	Next step
Start On	Enter the start date of the survey.	
Repeat	Select **Calendar month**.	
Repeat on This Day	Option 1: Repeat the survey on a specific date in the month.	
	Option 2: Repeat the survey on a specific day of the month. For example, the first Monday of every month.	
End Recurrence	Option 1: End the survey after a specific number of occurrences.	Enter the number of occurrences.
	Option 2: End the survey on a specific date.	Enter the end date.

    - Yearly frequency

Field	Description	Next step
Start On	Enter the start date of the survey.	
Repeat	Select **Year**.	
Repeat in This Month	Select the month on which you want to repeat the survey every year.	
Repeat on This Day	Option 1: Repeat the survey on a specific date in the month.	

Field	Description	Next step
	Option 2: Repeat the survey on a specific day of the month. For example, the first Monday of every month.	
End Recurrence	Option 1: End the survey after a specific number of occurrences.	Enter the number of occurrences.
	Option 2: End the survey on a specific date.	Enter the end date.

- Specific frequency

  To create a survey with a custom frequency that's not daily, weekly, or monthly (for instance, a survey every alternate day of the week), select **Specific**.

Field	Description	Next step
Start On	Enter the start date of the survey.	
Repeat	Select **Specific**.	
End Recurrence	Option 1: End the survey after a specific number of occurrences.	Enter the number of occurrences.
	Option 2: End the survey on a specific date.	Enter the end date.

3. In the **Number of Runs Per Period** field, specify how often you want the survey engine to run during a period so that the survey gets assigned to any new people in the target population. For example, let’s say you scheduled a monthly survey for the 1st of every month. If you selected the option **Every day of the period,** the survey engine will run every day of the month, identify new people who join at any time during the month, and assign the survey to them. But if you selected **Once per period**, the survey engine will run only once, on the 1st of the month, and will assign the survey to new people only the next month.
4. Enter the analysis period. This decides the period for which pulse scores are calculated and displayed as graphs on the employee’s Touchpoints page. For example, if the analysis period is 4 weeks, and the employee is assigned a weekly survey, pulse scores are calculated for each week and displayed over the 4-week period. To specify this analysis period, select **4** from the first list, and **Weeks** from the second list.

   > **Note:** The analysis period doesn’t control the number of periods displayed on the pulse score comparison chart on the manager’s Touchpoints Summary page.

5. Enter the threshold score value. Pulse scores that fall below the threshold value are considered as low scores.
6. Click **Generate** to generate the start and end dates of each period in the selected frequency. These dates are displayed in the Period Summary section. Employees can access the survey any time during each of these periods. If you change the number of occurrences or the survey end dates, you need to click the **Generate** button again to refresh these periods.

   A few points to consider about this section:

   - You can’t generate periods for a survey that has the recurrence frequency as **Specific**. In this case, you have to manually enter the start and end dates for each period. To create a survey that runs every alternate day

of the week, add the dates for each of these days, with the start and end dates being the same for a given day.
   - For other survey frequencies, you can't assign the survey to employees on any date that's outside of the generated periods. To add such a date, you need to change the frequency type to **Specific** and manually add that date.
   - If you don't want to run the survey on certain dates, say for example weekends or holidays, you can clear the **Active** checkbox next to those dates.
   - You can clear or select the **Active** checkbox next to a period only if its start date is on or after today's date and the survey engine hasn't already run for today's date.
7. Click **Save**.

What to do next

The survey is assigned to the target population at 12 AM UTC time of each survey period's start date.

After you've created the survey and assigned it to employees, to extend the survey for a longer period in the same survey frequency, you can edit the checklist template task and change the end date of the last period in the survey, if the survey hasn't already been assigned for that period. However, to change the survey frequency from daily to weekly, it's recommended that you end the daily frequency or make it inactive and create a new checklist template task for the weekly frequency.

> **Note:** When measuring employee sentiment by surveys, it's recommended that you create a weekly pulse survey with 1 to 3 questions, with an analysis period of 4 weeks, and an appropriate threshold score.

Notify Employees When a Survey is Assigned

You can configure notifications to let employees know that a survey is assigned to them. They can view these notifications in their worklist by clicking the **Notifications** icon on the global header.

To configure these notifications:

1. Click the **Display Settings** tab on the Checklist page.
2. Select **Send notification on checklist allocation**. This sends notifications each time the survey is assigned to employees in the configured recurrence frequency.
3. To send a notification to the assignee when the HR specialist or manager decides to manually mark the survey as complete, you can select the **Send notification when checklist is force completed** checkbox.

Assign the Touchpoints Survey

After creating and configuring the Touchpoints survey, the next step is to assign it to the target audience using the Journeys application. The Allocate Scheduled Journey scheduled process runs daily to assign the journey to the target audience. Employees can access the survey from their My Journeys page in the Journeys application and respond to it.

1. Open the Journeys application.
2. On the **Explore** tab, click **Survey**. The list of surveys appears.
3. Click **Daily Pulse Survey**.
4. Click **Assign Journey**.
5. Complete these fields on the Assign Journey page.

Field	Description
When to assign journey?	Assign the journey a few days before the start date of the survey.

Field	Description
Repeat	Select **As per schedule** to assign the survey according to its survey frequency.
Comments	Enter your comments, if any.
Selection Type	Select **Directs** to assign the survey to the direct reports of a line manager. Select **Organization** to assign the survey to all the direct and indirect reports in a line manager's or organizational leader's hierarchy.
Select a Person	Select the line manager's or organizational leader's name.

6. Click **Assign**. The Activity page appears, displaying the status of the assignment as Pending.
7. Click the **Refresh** button to see when the survey gets assigned to the target audience.

Related Topics

- Overview of Surveys in Journeys

Define Touchpoints Nudges

Nudges are set up using the Nudge Configuration work area.

Here are the scenarios in which nudges appear in Touchpoints. The nudges are triggered and sent to the recipient when the criteria defined in the nudge configuration is met.

> **Note:** After configuring nudges, ensure that you run the scheduled process, Process HCM Nudges. This triggers the nudges and delivers them to the configured channels. This table also lists the recommended run frequency of the scheduled process.

Module	Scenario	Criteria	Recipient	Nudge Channel	Recommended Run Frequency
Career Development	An employee doesn't have active goals in their development plan.	The nudge appears when there are no active goals in an employee's development plan.	Employee, Manager	Touchpoints card, check-in insights, email	Quarterly
Check-in	A check-in between a manager and employee hasn't been scheduled for a period of time.	The nudge appears when a check-in hasn't been scheduled for a specific number of days. This number is configured by the Administrator.	Manager	Touchpoints card, email	Weekly or monthly
Check-in	A check-in between a manager and employee is approaching.	The nudge appears a specific number of days before the scheduled check-in date.	Manager, Employee	Email	Weekly or monthly

Module	Scenario	Criteria	Recipient	Nudge Channel	Recommended Run Frequency
		This number is configured by the Administrator.			
Feedback	A manager hasn't provided feedback to an employee for a period of time.	The nudge appears when a manager hasn't provided feedback for a specific number of days. This number is configured by the Administrator.	Manager	Touchpoints card, check-in insights, email	Bi-monthly or monthly
Feedback	An employee hasn't given anytime feedback to their others for a period of time.	The nudge appears when an employee hasn't given anytime feedback to others for a specific number of days since the last time they gave feedback. This number is configured by the Administrator.	Employee	Touchpoints card, email	Bi-monthly or monthly
Feedback	An employee hasn't requested feedback for a period of time.	The nudge appears when an employee or manager hasn't requested feedback for themselves or for their team members for a specific number of days since the last time they requested feedback. This number is configured by the Administrator.	Employee, Manager	Touchpoints card, email	Bi-monthly or monthly
Goal Management	An employee has performance goals that are later than the target completion date.	The nudge appears when a specific number of days have passed since the target completion date. This number is configured by the Administrator.	Manager	Touchpoints card, check-in insights, email	Monthly
Goal Management	An employee has performance goals that are due soon but goal completion percentage is less than a defined percentage.	The nudge appears when a specific number of days remain before the target completion date, and the	Employee	Touchpoints card, check-in insights, email	Monthly

Module	Scenario	Criteria	Recipient	Nudge Channel	Recommended Run Frequency
		goal completion percentage is less than a specific target percentage. These values are configured by the Administrator.			
Goal Management	An employee has performance goals with a past goal start date and a status of Not Started.	The nudge appears when the goal remains in the Not Started status after a specific number of days since the goal start date. This number is configured by the Administrator.	Manager	Touchpoints card, check-in insights, email	Monthly
Goal Management	An employee has high priority aligned performance goals that are due soon.	The nudge appears when a specific number of days remain before the target completion date. This number is configured by the Administrator.	Manager	Touchpoints card, check-in insights, email	Monthly
Goal Management	An employee completes performance goals ahead of the target completion date.	The nudge appears when an employee completes goals a specific number of days ahead of the target completion date. This number is configured by the Administrator.	Manager	Touchpoints card, check-in insights, email	Monthly
Goal Management	An employee has performance goals that haven't been updated for a period of time.	The nudge appears when an employee hasn't updated their performance goals for a specific number of days since their last update. This number is configured by the Administrator.	Employee	Touchpoints card, check-in insights, email	Monthly
Goal Management	An employee doesn't have performance goals in the goal plan.	The nudge appears when performance goals aren't added	Employee, Manager	Touchpoints card, check-in insights, email, journeys	Monthly

Module	Scenario	Criteria	Recipient	Nudge Channel	Recommended Run Frequency
		to the goal plan for a specific number of days since the start of the current review period. This number is configured by the Administrator.			
Human Resources	An employee's work anniversary is approaching.	The nudge appears a specific number of days before the employee's work anniversary occurs. This number is configured by the Administrator.	Manager	Touchpoints card, email	Daily
Human Resources	An employee's birthday is approaching.	The nudge appears a specific number of days before the employee's birthday occurs. This number is configured by the Administrator.	Manager	Touchpoints card, email	Daily
Talent Profile	An employee hasn't updated their talent profile for a period of time.	The nudge appears when an employee hasn't updated their talent profile for a specific number of days since their last update. This number is configured by the Administrator.	Employee	Touchpoints card, check-in insights, email, journeys	Quarterly
Touchpoints Survey	An employee has a low pulse score.	The nudge appears when the pulse score falls below a threshold value. This value is preconfigured in the survey, and the Administrator can't change it.	Manager	Touchpoints card, check-in insights, email	Depends on the survey frequency
Touchpoints Survey	An employee has a low response rate to the pulse survey.	The nudge appears when an employee doesn't respond to a survey a specific number of times.	Worker	Touchpoints card, email	Depends on the survey frequency
			Manager	Touchpoints card, check-in insights, email	

Module	Scenario	Criteria	Recipient	Nudge Channel	Recommended Run Frequency
		This number is configured by the Administrator.			

This example shows you how to configure a nudge for this scenario: Employee has high priority aligned performance goals that are due soon.

1. Go to **My Client Groups** > **Employment** > **Nudge Configuration**.
2. Click **Add**.
3. From the **Module** list, select the nudge type, **Goal**.
4. Select the reason, **Employee has high priority aligned goals that are due soon**.
5. Edit the default configuration name, as applicable.
6. Set the status to **Active**.
7. Enter the number of days before the goal's target completion date by when the nudge must be triggered.
8. Click **Add** in the Channels section.
9. Select the **Email**, **Touchpoints card**, or **Check-in insight** channel type.
10. Select the **Active** checkbox.
11. Select the recipient of the channel type.
12. From the **Content Source** list, you can either select the default content that's available for the channel or create your own. If you select **User-defined Content**, enter your custom text for the channel. For example, for the **Email** channel type, specify a title and a message.
13. Click **OK**.

Related Topics

- Overview of Nudges

Configure and Run Scheduled Processes for Touchpoints

Scheduled processes are available for specific business needs in Touchpoints. You run these processes in the Scheduled Processes work area.

Name	Description	Recommended Frequency
Process HCM Nudges	Ensures that nudges are triggered on a timely basis	Daily
Aggregate Oracle Touchpoints Data	Aggregates these engagement metrics that are displayed on a manager's Touchpoints Summary page: • Team and organization average interactions • Team and organization average check-ins • Pulse score comparison chart containing averages for direct reports, indirect reports (if applicable), and the organization	Choosing a scheduling frequency is important because this determines how current the metrics are. The period for which averages are displayed in the pulse score comparison chart depends on the survey frequency. These averages are computed only until the survey end date, regardless of the frequency of the scheduled process. For example, you schedule this process to run every day, and you have a monthly survey assigned to your team that completes on the 30th of every month. When you view this chart in July, you will see the same pulse score averages from Jan – June displayed every day. These averages will change only when the

Name	Description	Recommended Frequency
		July survey is completed. Then, you can see the averages from February to July in August. The team and organization average metrics are running averages and are therefore relative to the time when the scheduled process is run. For example, if you run the process every day, the period for which these metrics are calculated will also change relative to the current date. The same rule applies to the number of check-ins displayed in the pie chart. Therefore, you can schedule the process depending on how frequently you want these metrics to be refreshed and also ensure that it aligns with the survey frequency. For example, if you have daily surveys, schedule the process on a daily basis.

The Aggregate Oracle Touchpoints Data has these additional parameters that you can specify:

- **Number of Parallel Subprocesses to Run –** To complete the scheduled process faster, you can run parallel processes simultaneously. You can provide a number in the range 1 to 20, depending on the system capacity.
- **Run Type –** You can select either an incremental run or a full run. A full run is required for the first time that you schedule this process. Thereafter, it's required only if you want to entirely reprocess the data for any reason. For subsequent runs, it's recommended to schedule an incremental run, as it aggregates data since the last run job.

Related Topics

- What are scheduled processes?

Configure Email Alert Notifications for Touchpoints

A manager or an employee receives email notifications when certain events or interactions occur in Touchpoints.

Some of these notifications are part of configured nudges, as mentioned in the topic, Define Touchpoints Nudges. Apart from these, the following notifications are sent on occurrence of these events and are configured in Alerts Composer:

Email Notifications

Event	Recipient	Alert Code
Received thank you note for sending anytime feedback	Employee/Manager	HRT_ANYTIME_FEEDBACK_PROVIDED
Manager scheduled a check-in	Employee	HRA_TP_CHECK_IN_DOC_CREATED
Employee scheduled check-in	Manager	HRA_TP_CHECK_IN_DOC_CREATED
Manager deleted a check-in	Employee	HRA_TP_CHECK_IN_DOC_DELETED
Employee deleted a check-in	Manager	HRA_TP_CHECK_IN_DOC_DELETED

Event	Recipient	Alert Code
Manager deleted a check-in discussion topic (feedback, performance and development goals, and Insights topics)	Employee	HRA_TP_CHECK_IN_DISCUSSION_TOPIC_DELETED
Employee deleted a check-in discussion topic (feedback, performance and development goals, and Insights topics)	Manager	HRA_TP_CHECK_IN_DISCUSSION_TOPIC_DELETED
Employee updated a check-in (added a discussion topic, updated the name of a general discussion topic, deleted a discussion topic, or added or updated a note)	Manager	HRA_TP_CHECK_IN_DOC_UPDATED
Manager updated a check-in (added a discussion topic, updated the name of a general discussion topic, deleted a discussion topic, or added or updated a note)	Employee	HRA_TP_CHECK_IN_DOC_UPDATED

Apart from these, notifications are also sent to an employee or manager when they receive anytime feedback from others. These notifications aren't configured in Alerts Composer, but enabled from **My Client Groups** > **Performance** > **Talent Notifications** > **Profile Management**.

Note that the notifications pertaining to a Touchpoints check-in will navigate the user to Touchpoints.

Configure Notifications Using Alerts Composer

As a Human Capital Management Integration Specialist, you can configure notifications using Alerts Composer. You need to have the Access Alerts Composer privilege (HRC_ACCESS_ALERTS_COMPOSER_PRIV) to do so.

Here's how you configure the notifications:

1. From Home, go to **Navigator** > **Tools** > **Alerts Composer**.
2. Search for the keywords, **check-in**, **celebrations**, or **feedback** to see the related alerts.
3. Select **Edit** from the Action menu next to the alert that you want to enable or disable.
4. On the Edit Event Alert page, you can see the available email templates sent to different roles as part of the alert. They are enabled by default.
5. You can enable or disable each of the email templates from the **Enabled** list.
6. To edit the contents of the email template, select **Manage Recipients and Message** from the **Edit** menu. For check-in notifications, note that the subject line and message text use functions and conditional logic. While editing the email template, ensure that you don't incorrectly modify the conditional logic or functions, as these are necessary to display the appropriate information in the email notification.

   > **Note:** It's recommended to edit the message text in the Rich Text Editing mode to ensure that the template formatting is preserved.

7. To edit the content in supported languages, click the **Translation Editor** icon, and make the required changes.
8. Click **Apply**, if you've performed the tasks in steps 5 and 6. Else, click **Save and Close**.

Related Topics

- Overview
- Anytime Feedback Notifications

Configure the Touchpoints Appearance

Touchpoints is built using Visual Builder Cloud Service (VBCS). Hence, the branding, logo, theme, and color scheme of the VBCS-based pages are different from, or might not appear the same as the current HCM pages. However, you can change the branding, logo, color scheme, and theme of Touchpoints pages using the **Configuration** > **Appearance** menu.

You can also change the color scheme of the pulse score graph on the Employees page.

Configure the Manager's Dashboard for Specific Manager Types

You can allow specific manager types to view engagement and interaction analytics on a manager's dashboard and take employee-related actions from **My Team** > **Touchpoints**.

You can configure this using the **Touchpoints Configuration** task available as part of quick actions in **My Client Groups** > **Show More**.

Using this task, you can allow data access to specific manager types, such as a project manager or a resource manager (that is, a matrix manager who's already configured in Global HR). You could also allow data access to all manager types, which includes line managers and matrix managers.

> **Note:** A line manager will always have access to the manager's dashboard, regardless of the selection you make in this task.

This configuration will impact the following interaction analytics and tasks that the selected manager types can view and perform. The list of employees considered for these analytics and tasks will be specific to the manager type with whom they have a work relationship.

Summary tab

- Team – Average Interactions
- Team – Average Check-ins
- Interactions chart
- Pulse score comparison chart
- List of employees displayed in the Upcoming check-ins, Overdue check-ins, and Low pulse scores sections

Employees tab

- List of employees
- Actions such as scheduling check-ins, providing feedback, requesting feedback, or sending awards and recognitions.

> **Note:** Using the **Touchpoints Configuration** task, you can also configure the number of past days for which overdue must be displayed and number of future days for which upcoming check-ins must be displayed on the **Summary** tab.

Related Topics

- Examples of Multiple Managers for an Assignment
- Matrix Manager for an Assignment

Touchpoints for Managers

Touchpoints for Managers

Use Touchpoints to understand employee sentiment better, boost engagement levels, and have informed and meaningful interactions with them.

Here's a quick overview of the various tasks that a manager can perform using Touchpoints.

Watch video

See the rest of the topics in this chapter for more detailed information on these tasks.

The Manager's Dashboard

You can access the manager’s dashboard from **My Team** > **Touchpoints**. This dashboard has two tabs: **Summary** and **Employees**.

Summary Tab

On the Summary tab, you can view the level of interactions in your team and analyze pulse trends over time for your direct reports, dotted-line reports, indirect reports, and your organization.

> **Note:** The term dotted-line reports is used in the context of a matrix manager's reports, while the term indirect reports is used in the context of a higher level manager's reports in the organization hierarchy. The types of managers who can view the engagement metrics on this tab is configured in the **Touchpoints Configuration** task available as part of quick actions in **My Client Groups**. For more information, see the topic, *Configure the Touchpoints Appearance*.

On this tab, you can view the following metrics about employee engagement levels:

- Interaction analytics for your team and the organization, displayed as:
  - Team – Average Interactions
  - Organization – Average Interactions
  - Team – Average Check-ins
  - Organization – Average Check-ins
- Count of interactions for each employee in your team, displayed as a bar chart.
- Pulse score comparison chart, that helps you gain a better understanding of the management efforts taken to improve employee engagement levels in your immediate hierarchy and in the rest of the organization.

A few key points to consider about the analytics on this page:

- Check-ins and other interaction analytics are displayed on this page only when check-ins are scheduled and completed, or feedback, awards, or recognitions are sent or received for your team members.
- The analytics change according to the selected manager and their team of direct and dotted-line reports, if any.
- The pulse score comparison graph for indirect reports appears only if the selected manager has indirect teams reporting to them.
- If there are multiple surveys available, you can analyze pulse trends for each survey. To do this, right-click the Pulse score comparison chart and select a survey. The Pulse score comparison chart will refresh with the selected survey's scores. Note that you can view the scores only if the survey is assigned to your team.

  When you switch to another survey, it also refreshes the following pages and sections with that survey's data:
  - Low pulse scores section on the **Summary** tab
  - Pulse score listing of employees on the **Employees** tab
  - Pulse score graph displayed on the employee's Touchpoints page (note that you can't switch between surveys from the graph on this page)
- The period for which the pulse score comparison graph is displayed is determined by the analysis period of the survey. It's recommended that you set the analysis period to match with the survey frequency so that the graph is rendered in a readable manner. For example, if the survey frequency is daily and you set the analysis period to 1 month, the graph will display the past 30 days' data, but the graph will be difficult to read. So, for a daily frequency, it's recommended to set the analysis period to 1 week or 7 days so that you can read the pulse survey trend easily.

  Similarly, consider the recommendations below:
  - If the survey frequency is weekly and the analysis period is set to 4 weeks or 1 month, scores are displayed for the past 4 weeks.
  - If the survey frequency is monthly and the analysis period is 4 months, scores are displayed for the past 4 months.
  - If the survey frequency is yearly and the analysis period is for 5 years, scores are displayed for the past 5 years.
  - If the survey frequency is set to a specific frequency, for example, every alternate day, and the analysis period is set to 1 month, scores are displayed for 15 days over the past month.

  When you change the analysis period for the survey, you need to run the scheduled process, Aggregate Oracle Touchpoints Data, with the Run Type as Full. This will ensure that the graph is refreshed with the latest data.

> **Note:** The x-axis on the pulse score comparison chart shows the survey end date for each frequency. The same analysis period controls the period displayed in the pulse score chart of the individual employee as well.

View Engagement Metrics for Teams in Your Hierarchy

To view pulse trends for any team within your span of control, use the **Switch Team** button and select a manager's name. A matrix manager can switch to their dotted-line report's team. If this dotted-line report also happens to be a matrix manager, engagement metrics, pulse scores, and check-in statuses are displayed for that dotted-line report's team as well. A manager can drill down to the furthest level in the matrix or direct line hierarchy. The organization hierarchy is displayed as breadcrumbs on the Switch team panel.

Employee Low Pulse Scores

You can view the list of employees with the lowest pulse scores in the **Low pulse scores** section. This section displays the lowest pulse scores first. If an employee's pulse score falls below a threshold value, it's considered as low. This threshold value is defined in the **Schedule Allocation** tab of the survey configuration. Here, you can also see the assignment name for each employee.

Upcoming Check-ins and Overdue Check-ins

These two sections display Touchpoints and Performance check-ins that are upcoming and overdue. Check-ins include one-time and recurring Touchpoints check-ins and Performance check-ins.

The Upcoming check-ins section displays check-ins that are coming up within a specific number of days. This value is configurable using a profile option, ORA_HRE_UPCOMING_CHECKIN_THRESHOLD. The default value is 30 days, which can be changed.

The Overdue check-ins section displays check-ins that are overdue by a specific number of days. This value is configurable using a profile option, ORA_HRE_OVERDUE_CHECKIN_THRESHOLD. The default value is 30 days, which can be changed.

These sections also display the active assignment name for each employee. You can view the upcoming check-ins for indirect reports also.

From these sections, you can directly schedule a check-in by clicking the **Schedule Check-In** icon next to each employee name.

Employees Page

The Upcoming check-ins, Overdue check-ins, and Low pulse score sections display the first three employees who match the criteria in these sections. To view the remaining employees, click the **See more** link. This takes you to the Employees page with the filter corresponding to the section automatically applied. Here, you can see the full list of employees who match the filter criteria. For example, when you click the **See more** link in the Upcoming check-ins section, the Employees page is displayed with the **Upcoming check-ins** filter automatically applied.

You can also directly click the **Employees** tab to view the Employees page, but no filters are applied in this case.

The list of employees that appears on the Employees page pertains to the manager who's currently selected on the Summary page. You can see indirect reports' data also here.

For each employee, these details are displayed:

- The role name related to the assignment. If an employee has multiple assignments, their name is repeated for each assignment, along with a different role name.

- The latest pulse score of the survey selected on the Summary page. The pulse score is defined and calculated through the scoring option set on the survey questionnaire.
- A 7-day trend next to the score.

You can use the **Switch Team** button on the Employees page to view the employee data for a different manager who's in your reporting hierarchy (could be a direct or indirect manager). Note that the data on the Summary page will pertain to the manager already selected on that page. It won't change according to the manager you selected on the Employees page.

> **Note:** A matrix manager can switch to a dotted-line report's team. If this report happens to be a matrix manager, data related to engagement metrics, pulse scores, and check-in statuses is displayed for that team as well. A manager can drill down to the furthest level in the matrix or direct line hierarchy. The organization hierarchy is displayed as breadcrumbs on the Switch team panel.

You can use the **Sort By** option on the Employees page to sort the list based on the ascending or descending order of employee names, highest or lowest pulse scores, or upcoming or furthest check-ins.

Extensibility for the Manager's Dashboard

You can now display or hide the following page features by using the corresponding page property in Oracle Visual Builder Studio. They're displayed by default:

- Pulse score comparison graph on the Summary tab.
- Low pulse scores section on the Summary tab and pulse score for each employee on the Employees tab.
- Feedback Received analytic on the Interactions graph and the list view of the graph.
- Recognitions and Awards analytic on the Interactions graph and the list view of the graph.

View an Employee's Touchpoints Page

Selecting an employee’s name on the Employees page takes you to their Touchpoints page. On this page, both managers and matrix managers can view all the following data for all their reports, except that the **Recommendations for you** panel isn't available for dotted-line reports.

The types of managers who can view the engagement metrics on this tab and take employee-related actions is configured in the **Touchpoints Configuration** task available as part of quick actions in **My Client Groups**. For more information, see the topic, *Configure the Touchpoints Appearance*.

Pulse score chart

You can see the past and current pulse scores for the employee over a period of time, which depends on the analysis period configured in the survey. It’s recommended that you set the analysis period to match with the survey frequency so that the graph is rendered in a readable manner. For example, if the survey frequency is daily and you set the analysis period to 1 month, the graph will display the past 30 days’ data, but the graph will be difficult to read. So, for a daily frequency, it’s recommended to set the analysis period to 1 week or 7 days so that you can read the pulse survey trend easily. Similarly, consider the recommendations below:

- If the survey frequency is weekly and the analysis period is set to 4 weeks or 1 month, scores are displayed for the past 4 weeks.

- If the survey frequency is monthly and the analysis period is 4 months, scores are displayed for the past 4 months.
- If the survey frequency is yearly and the analysis period is for 5 years, scores are displayed for the past 5 years.
- If the survey frequency is set to a specific frequency, for example, every alternate day, and the analysis period is set to 1 month, scores are displayed for 15 days over the past month.

Note: The X-axis on the chart shows the survey end date for each frequency. This chart can be shown or hidden using a page property in Oracle Visual Builder Studio. The same analysis period controls the period displayed in the Pulse score comparison chart for the manager as well.If there are multiple surveys assigned to an employee, you can't switch between them by right-clicking the pulse survey graph on this page. You must use the Pulse score comparison chart on the **Summary** tab to switch to another survey.

Events and interactions

Here, the past interactions and upcoming check-ins for the employee appear in a timeline view. The timeline displays data for a maximum of 12 months in the past and 6 months in the future. You can also view them as a list, by clicking the list view icon.

When you view this chart before zooming out or zooming in, you'll see data for up to 3 months in the past and 1 month in the future. However, you can change this viewport by using page properties in Oracle Visual Builder Studio.

In the list view, the default view displays data for the past 12 months and future 6 months. This isn't configurable using page properties.

Past interactions include check-in meetings scheduled between you and the employee, and anytime feedback, requested feedback, awards, and recognitions that are received from you and others. This data also includes performance check-ins scheduled using Performance Management.

You can sort the list view by the type of interaction, in alphabetical order or the date of the interaction. By default, the list is sorted based on the type of interaction, from A to Z.

Recommendations for you

The Recommendations for you panel lists recommended actions or nudges related to your direct reports that encourage interactions with them to achieve overall increased engagement. These recommended actions, when configured by the administrator using the Nudge Configuration work area, include the following:

- Schedule a check-in with them
- Recognize their personal milestones such as birthdays and anniversaries and achievements such as completing a goal early
- Provide feedback to them
- Prepare for an upcoming check-in
- Discuss performance goals that are at risk of delay
- Discuss pulse survey scores and survey response rates

You can dismiss a recommendation by clicking the **Dismiss** icon next to the action button.

This panel can be shown or hidden using a page property in Oracle Visual Builder Studio.

Promote Engagement through Interactions

Schedule a Check-In With Your Employee

Regular check-ins helps employees discuss concerns and share sentiments in a timely manner so that managers can address them effectively. You can schedule check-ins with your direct reports, indirect reports, and dotted-line reports.

To get started, click the **Employees** tab on your Touchpoints application. Select an employee's name to view their Touchpoints page and click the **Schedule Check-In** button. You can also click the **Schedule Check-In** button, if it appears as a recommended action in the **Recommendations for you** panel.

If you're an indirect manager, you can schedule a Touchpoints check-in for any employee in your hierarchy. To do so, click the **Switch Team** button on the manager's dashboard and select a manager who reports to you. The dashboard refreshes with the selected manager's engagement details. Click the **Employees** tab on the dashboard and schedule a check-in with any indirect report using the **Actions** menu (represented by three dots).

When scheduling a check-in, you can do these:

- When an employee has multiple assignments, you can choose the assignment that you want to discuss during the check-in.
- Build an agenda that suits your needs.
- Add your own discussion topics or choose from a list of suggested topics. To view these topics, click the **Suggested Topics** button.
- Create a meeting invite. The ICS file will be automatically downloaded after you schedule the check-in, which you can then add to your calendar.

Suggested discussion topics are of the following types, displayed across the following tabs:

- **Suggestions**: Displays GenAI-based personalized discussion topics that are geared toward an employee's career development. These topics are based on the employee's job or position title, department, job description and responsibilities, goals, and other relevant factors. You'll see a maximum of three such topics. When you add goals, it is pending submission. You must go to Goals Center to submit it for approval.

  Below this list, you might also see nudge-based topics. For example, if you haven't given feedback to an employee for a long period of time, or if the employee has a goal that's not started even past the goal start date, these tasks are suggested as topics to be added to the check-in.

  On this tab, you might also see open topics from previous check-ins. Any topics that you hadn't marked as discussed will be available for you to transfer to the current check-in that you're scheduling. Topics from check-ins in the recent past are displayed first, followed by topics from earlier check-ins. You can't transfer questionnaires and feedback topics, even if they were open in previous check-ins.

  > **Note:** Nudge-based topic suggestions appear only for direct reports. They aren't available for dotted-line reports.

  The **Suggestions** tab can be shown or hidden using the corresponding page property in Oracle Visual Builder Studio. If the Touchpoints check-in template is configured not to display AI-based discussion topics, nudge-based topics, and open topics from previous check-ins, the **Suggestions** tab will also not be displayed.

- **Goals**: Displays performance goals from active goal plans whose review period end dates fall within the last 18 months. The tab also include active development goals. Goals with no target completion dates are displayed first, followed by goals with target completion dates in descending order.

  > **Note:** When you want to add a performance goal to a check-in, it's added to any existing check-in that's coming up within the next 7 days. If there's no check-in coming up, the performance goal is added to a new check-in.

- **Feedback** topics, which include anytime feedback given to the employee that you can add to the check-in for relevant discussions.
- **Competencies**, if they're configured in the check-in template. You can select active competencies from the employee's profile and add them to the check-in as discussion topics.
- **Skills**, if they're configured in the check-in template. You can add attained and developing dynamic skills from Skills Center to the check-in as discussion topics.

> **Note:** If questionnaires are configured in the check-in template, they're added by default as discussion topics. Questionnaires might be present for both workers and managers, if they're configured in the template.

After adding these topics to the check-in, you can do the following (before you schedule the check-in):

- Add notes to the discussion topics.
- Delete the topics that you just added.
- Click the skill chip to rate the skill and view or invite endorsements for the employee on that skill.
- Edit a performance or development goal after you add it to a check-in from the **Goals** tab. After you edit the goal, it is sent to Goals Center for approval according to approval rules. Note that you can't edit a goal when it's in a pending approval in Goals Center.

> **Note:** Notes added to a discussion topic are visible in other check-ins, if that discussion topic is added to those check-ins. These notes are also called as progress notes. To view them, expand a discussion topic on the check-in page, and click **View goal details** for a goal topic, **View progress notes** for a skill or general discussion topic, and **View competency details** for a competency topic. The progress notes for skills and competencies are carried over only from check-ins that are created for the same assignment in the last 12 months.After you add an open discussion topic from a previous check-in, you can view progress notes for that topic, if notes were previously added to it. This applies to a goal, skill, competency, or general discussion topic.

After you schedule the check-in, you can modify the check-in and change these details. See the topic, *Managers - Modify a Check-In* for more information.

The number of topics marked as Not Discussed and the total number of topics in the check-in are indicated in the cards displayed on the **Events and interactions** timeline.

When you schedule a check-in, the employee receives an email notification a few days before the check-in date, depending on the nudge configuration. They can then modify the check-in by adding their own discussion topics, or by adding notes to the existing discussion topics.

> **Note:** You can schedule only one check-in per day with an employee.

Related Topics

- Schedule a Recurring Check-In
- Check-In Documents

Managers - Modify a Check-In

As a manager, you can view and modify a past or upcoming check-in by double-clicking it from the Events and interactions section. You can modify Touchpoints check-ins and Performance check-ins.

Modifying a Touchpoints Check-In

While modifying a Touchpoints check-in, you can do these:

- View progress notes and other details for goal-related discussion topics and add your progress notes.
- View questionnaires, if any, and add your responses to the manager's questionnaire.
- View progress notes for skills and competencies and add your progress notes.
- View feedback comments.
- Click a skill chip to mark it as attained, and view endorsements from others on that skill. If it's a skill you've endorsed, you can remove the endorsement.
- Add new discussion topics.
- Edit the title of the custom discussion topics that you added.
- Add notes to all discussion topics or edit the notes that you added.
- Mark completed discussion topics as discussed.
- Delete a discussion topic, only if:
    - You created it.
    - It has notes that only you added.
    - It's not marked as discussed.
- Change the check-in date.
- Update the meeting invite details, if check-in includes an invite. To do this, you need to open the check-in and click the **Meeting invite** link.

Note:

- If you're an indirect manager, you can only view check-ins, both past and upcoming. You can't modify check-ins.
- You can add nudge-based topics only while modifying upcoming check-ins.
- You can delete a check-in only if you created it and it doesn't have any notes that others added to any of its discussion topics. But it can have notes that you added to its discussion topics. Also, the check-in shouldn't contain any discussion topics that are marked as discussed.

Modifying a Performance Check-In

You can update a Performance check-in from Touchpoints by:

- Changing the check-in date
- Adding or removing custom or recommended discussion topics
- Adding notes to discussion topics
- Marking topics as discussed

You can also delete a Performance check-in. These changes are reflected in Performance Management as well.

Send Feedback

Sending timely feedback on an employee's work performance improves overall productivity. You can send feedback to your direct reports and dotted-line reports.

To get started, click the **Employees** tab on the Touchpoints landing page and select an employee. Next, select the **Send Feedback** option from the **Actions** menu, or click the **Send Feedback** button, if it appears as a recommended action in the **Recommendations for you** panel.

While sending feedback, you can add attachments to support your comments. You can also set the feedback visibility to one of these:

- Everyone
- Managers only
- Managers and employee
- Only me
- Only employee and me

You can also send a thank you note to anyone who gave feedback to a team member.

To send a thank you note, double-click the feedback from the **Events and interactions** section and select the **Send Thank You** option from the Actions menu.

> **Note:** You can send a thank you note only if the alert notification template, Manager/HR Thanks Anytime Feedback Provider, which is part of the **Anytime Feedback Provided** alert, is enabled in Alerts Composer.

Related Topics

- Anytime Feedback

Recognize and Award Employees

The Recognition and Award features of Oracle Celebrate are integrated with Touchpoints and offer more options to award and recognize employees for their achievements and milestones.

> **Note:** These replace the Celebrate Event feature that was present until the 24C upgrade. Therefore, the **Actions** menu on your Touchpoints page now displays two options – **Recognize** and **Send Award**, instead of **Celebrate Event**, when you have the required privilege added to your role.

Recognition programs can be created by the administrator to appreciate employees and celebrate milestones such as birthdays and work anniversaries, while award programs can be created for celebrating key achievements. When these programs are created, they're available in Oracle Celebrate and Touchpoints. For more details on creating recognition and award programs, see the topic *Create Programs* .

Recognition programs are usually configured to promote your organization's cultural values. Recognitions appear on the employee's Events and Interactions timeline as soon as they're sent.

Awards might go through an approval process through the management hierarchy, if approval rules are configured by the Administrator. When the awards are approved, the employee receives them and they also appear in the Events and Interactions timeline of the employee's Touchpoints page.

You can send awards and recognitions by navigating to **My Team** > **Touchpoints** and selecting an employee from the **Employees** tab and clicking the **Actions**menu.

Managers can send awards to their direct and indirect reports. They can send recognitions to anyone in the organization.

Here are a few things to consider about recognitions and awards:

- Awards and recognitions sent from the Celebrate application will also reflect in the employee's Events and Interactions timeline. Similarly, any award or recognition sent from Touchpoints will be visible in Celebrate.
- If there are existing Celebration events displayed on the Events and Interactions timeline, they will continue to be displayed until the timeline period is over. You can click them to view the details on the drawer panel.
- To send recognitions or awards from Touchpoints, the requirements are the same as for HCM Celebrate:
  - At least one recognition or award program needs to exist.
  - The recipient of the recognition or award program needs to be eligible to the program.

Related Topics

- Introduction to Oracle Celebrate
- Assign Roles and Privileges

Touchpoints for Employees

Touchpoints for Employees

Use Touchpoints to build stronger relationships with your manager and enable your management team to address your needs and concerns as they arise.

Here's a quick overview of the various tasks that an employee can perform using Touchpoints.

Watch video

See the rest of the topics in this chapter for more detailed information on these tasks.

Understand Your Engagement

On your Touchpoints page (accessible from **Me** > **Touchpoints**), you can review your current and past pulse scores for pulse surveys that you've taken.

Pulse Survey Chart

The pulse scores on this chart are displayed over a period that matches the analysis period configured in the survey. The pulse score data is displayed for as many days as in the pulse survey frequency. For example, if the analysis period is 4 weeks, and you're assigned a weekly survey, you can see the pulse scores for each week over the 4-week period.

If there are multiple surveys assigned to you, you can right-click the pulse survey chart and select another survey. This will refresh the pulse survey chart with the selected survey's data.

You can show or hide this chart using a page property in Oracle Visual Builder Studio.

Events and Interactions

On your Touchpoints page, you can also view a timeline of events and interactions with your manager and others in the organization.

The timeline displays data for a maximum of 12 months in the past and 6 months in the future. You can also view them as a list, by clicking the list view icon.

Interactions include past and upcoming check-ins, feedback that you've received and that's shared with you, and recognitions or awards that you've received. You can also see performance check-ins that are scheduled using Performance Management.

You can sort the list view by the type of interaction, in alphabetical order or the date of the interaction. By default, the list is sorted based on the type of interaction, from A to Z.

> **Note:** You can't view feedback or recognitions you've given to others in your timeline. When you receive recognitions, they appear in your timeline as soon as you've received them. Awards reflect in your timeline after they're approved, if approval rules have been configured.

Recommendations For You

Another key feature of this page is the **Recommendations for you** panel, which lists recommended actions that encourage interactions with your direct manager to achieve overall increased engagement. These recommended actions, when configured by the administrator in the Nudge Configuration work area, include the following:

- Schedule a check-in with your manager
- Prepare for an upcoming check-in with your manager
- Discuss performance goals that are at risk of delay with your manager
- Take a survey that has been assigned
- Provide feedback to colleagues or managers
- Send recognitions to anyone in the organization

When you add a discussion topic to a check-in, the discussion topic is added to any existing check-in that's coming up within the next 7 days. If there's no check-in scheduled within the next 7 days, it's added to a new check-in.

You can dismiss these recommendations by clicking the **Dismiss** icon next to the recommended action button.

This panel can be shown or hidden using a page property in Oracle Visual Builder Studio.

Schedule a Check-In with Your Manager

You can schedule check-ins with your manager as often as you need using Touchpoints. When you schedule a check-in, you can add custom discussion topics and recommended topics. You can also modify the check-in at any time.

When scheduling a check-in, if you have multiple assignments that report to a single manager, you can select the assignment relevant to the check-in. If you have multiple managers, you can select the manager with whom you want to schedule the check-in. This includes matrix managers and indirect managers.

> **Note:** While selecting a manager, the list of managers is controlled by the values specified in the ORA_HRA_MANAGER_LEVELS profile option.

To schedule a check-in, go to **Me** > **Quick Actions** > **Show More** > **Touchpoints**, and select the **Schedule Check-In** option from the Actions menu.

To view topic suggestions to add to the check-in, click the **Suggested Topics** button. These topics are personalized suggestions that are displayed in the following tabs:

- **Suggestions –** Displays GenAI-based personalized discussion topics that are geared toward an employee's career development. These topics are based on the employee's job or position title, department, job description and responsibilities, goals, and other relevant factors. You'll see a maximum of three such topics. When you add goals, it is pending submission. You must go to Goals Center to submit it for approval.

  Below this list, you also see nudge-based topics and any open topics that weren't marked as discussed in previous check-ins. You can add these open topics to the current check-in. Note that you can't transfer questionnaires and feedback topics from previous check-ins, even if they weren't marked as discussed.
- **Goals –** Performance goals from active goal plans whose review period end dates fall within the last 18 months. Also includes any active development goals. Goals with no target completion dates are displayed first, followed by goals with target completion dates in descending order.
- **Feedback –** Anytime feedback that you've received from your manager or others in the organization and made visible to you.
- **Competencies**, if they're configured in the check-in template. You can select active competencies from your talent profile and add them to the check-in as discussion topics.
- **Skills**, if they're configured in the check-in template. You can select attained and developing skills from Skills Center as discussion topics.

> **Note:** If questionnaires are configured in the check-in template, they're added by default as discussion topics. Questionnaires might be added for both workers and managers, depending on the template configuration.

After adding these topics to the check-in, you can do the following (before you schedule the check-in):

- Add notes to the topics.
- Delete the topics that you just added.
- Click the skill chip to rate the skill and view or invite endorsements from others on that skill.

- Create a meeting invite. The ICS file will be automatically downloaded after you schedule the check-in, which you can then add to your calendar.
- Edit a performance or development goal after you add it to a check-in from the **Goals** tab. After you edit the goal, it is sent to Goals Center for approval according to approval rules. Note that you can’t edit a goal when it’s in a pending approval in Goals Center.

Note:

- Notes added to a discussion topic are visible in other check-ins, if that discussion topic is added to those check-ins. These notes are also called as progress notes. To view them, expand a discussion topic on the check-in page, and click **View goal details** for a goal topic, **View progress notes** for a skill or general discussion topic, and **View competency details** for a competency topic. The progress notes for skills and competencies are carried over only from check-ins that are created for the same assignment in the last 12 months.

  After you add an open discussion topic from a previous check-in, you can view progress notes for that topic, if notes were previously added to it. This applies to a goal, skill, competency, or general discussion topic.
- You can schedule only one check-in per day with your manager.

Related Topics

- Schedule a Recurring Check-In
- Check-In Documents

Employees - Modify a Check-In

When your manager schedules a check-in with you, you'll receive an email notification a few days before the scheduled date, depending on the nudge configuration. You can then modify the check-in by adding your own notes to the discussion topics. You can also add your own custom discussion topics or choose from recommended topics.

Modifying a Touchpoints Check-In

You can also view and modify past or future check-ins. To modify a check-in, double-click it from the Events and interactions section.

While modifying a Touchpoints check-in, you can do these:

- View progress notes and other details for goal-related discussion topics and add your progress notes.
- View questionnaires, if any, and add your responses to the manager’s questionnaire.
- View progress notes for skills and competencies and add your progress notes.
- Click a skill chip to mark it as attained and view endorsements from others on that skill.
- View feedback comments.
- Add new discussion topics.
- Edit the title of the custom discussion topics that you added.
- Add notes to all discussion topics or edit the notes that you added.
- Mark completed discussion topics as discussed.
- Delete a discussion topic only if:

    - You created it.
    - It has notes that only you added to it.
    - It's not marked as discussed.
- Change the check-in date.
- Update the meeting invite details, if check-in includes an invite. To do this, you need to open the check-in and click the **Meeting invite** link.

> **Note:**
> - You can add nudge-based discussion topics only while modifying upcoming check-ins.
> - You can delete a check-in only if you created it and it doesn't have any notes that others added to any of its discussion topics. But it can have notes that you added to its discussion topics. Additionally, the check-in shouldn't contain any discussion topics that are marked as discussed.

Modifying a Performance Check-In

You can update a Performance check-in from Touchpoints by:

- Changing the check-in date
- Adding or removing custom or recommended discussion topics
- Adding notes to discussion topics
- Marking topics as discussed

You can also delete a Performance check-in. These changes are reflected in Performance Management as well.

Send Feedback and Recognitions

You can send feedback or recognitions to anyone in the organization to appreciate their work or celebrate their personal milestones.

To do so, go to **Me** > **Quick Actions** > > **Show More** > **Touchpoints**, and select the required option from the **Actions** menu on your Touchpoints page.

Recognitions

The Recognition feature of Oracle Celebrate is integrated with Touchpoints and offer more options to recognize employees.

> **Note:** This replaces the Celebrate Event feature that was present until the 24C upgrade. Therefore, the **Actions** menu on your Touchpoints page now displays the option **Recognize** instead of **Celebrate Event**.

You can send recognitions from either Touchpoints or Celebrate. Recognitions that you send from one of these applications is visible in the other. Recognitions that you receive are displayed on your Events and Interactions timeline, but the recognitions that you send to others aren't displayed.

> **Note:** The employee role can only send recognitions and not awards.

Feedback

While sending feedback, you can add attachments to support your comments. You can also set the feedback visibility to one of these:

- Everyone
- Managers only
- Managers and employee
- Only me
- Only employee and me

You can also send a thank you note to a manager or colleague who sent you feedback.

To send a thank you note, double-click a feedback from the Events and interactions section. Then, select the **Send Thank You** option from the Actions menu.

> **Note:** You can send a thank you note only if the alert notification template Worker Thanks Anytime Feedback Provider, which is part of the **Anytime Feedback Provided** alert, is enabled in Alerts Composer.

Related Topics

- Introduction to Oracle Celebrate
- Anytime Feedback

Other Manager and Employee Tasks

Suggested Actions After a Check-In Discussion

GenAI-powered performance and development goals are now suggested as an outcome of check-in discussion.

The goals are relevant to the employee's job title, department, role description, role responsibilities, check-in details, and existing goals.

When you click the **Suggested Actions** button on a check-in page, three goals are displayed. You can then add them as follow-up actions after the check-in discussion is completed.

Request Feedback Using Touchpoints

As an employee, you can now request feedback from your manager or peers using Touchpoints. As a manager, you can request others in the organization to give feedback about your team members.

You can request two types of feedback: general feedback or feedback on performance goals.

- To request feedback for yourself, go to your Touchpoints page and select **Request Feedback** from the **Actions** menu.
- To request feedback for a team member, click the **Employees** tab on the Touchpoints Summary page. From the **Actions** menu next to an employee, select **Request Feedback**.

To request feedback, these feedback templates must exist in the Feedback Templates section in Performance Management:

- For general feedback, you can have one or more active general feedback templates.
- For feedback on goals, you must have one active performance goal feedback template.

A few points to note:

- You can request feedback from your manager, direct peers, or anyone in the organization. You can request feedback from multiple employees as part of the same feedback request.
- You can choose as many performance goals as you want to request feedback on.
- For general feedback, you can select the questionnaire that you want to attach to the request, if more than one general feedback template exists. For feedback on goals, questions from the most recent performance goal feedback template are automatically included in the request.
- You can add your own questions to the questionnaire, if the questionnaire template supports additional questions. When requesting feedback on goals, all questions are repeated for each performance goal in the request sent to the feedback provider.
- When employees request feedback, they can choose to share the received feedback with their manager or with themselves. When a manager requests feedback for an employee, they can choose to share the received feedback with the employee.
- You can specify a due date for completing the feedback and add an optional message to the feedback provider.

After an employee has received feedback, they can view it in the **Events and interactions** timeline on their Touchpoints page. Managers can view the feedback received by their employees in the **Events and interactions** timeline on the employee's Touchpoints page. However, the feedback appears in the timeline only if it's shared with the manager.

As a manager or employee, you can view and add the received feedback as a discussion topic to a check-in agenda. To do this, click the **Feedback** tab on the **Recommended topics** panel of the check-in page. To view the complete feedback, click the **View more** link on this tab.

Average Team Interaction Analytics

Any feedback that an employee or manager has requested is added to the **Average Team Interactions** analytics displayed on the manager's Touchpoints Summary page. This includes feedback requested on goals as well.

Notifications

The feedback provider receives a notification in these scenarios:

- A manager or employee requests feedback from them.
- The due date for providing requested feedback nears.
- A manager or employee thanks them for their feedback.

The feedback provider receives a separate notification for each performance goal included as part of the request.

The person who requests feedback receives a notification when the feedback is completed or revised. The manager also receives a notification about completed or revised feedback, if the feedback is shared with them.

Related Topics

- Requested Feedback
- How can I create a feedback template for performance goals?

Schedule a Recurring Check-In

As a manager or an employee, you can schedule recurring check-ins in Touchpoints according to the frequency of your choice. You can also add recurring discussion topics to these check-ins, as required.

You can schedule recurring check-ins on a daily, weekly, monthly, or yearly basis.

Here's some info regarding each scheduling frequency:

- Daily recurrence: You can end the daily recurrence by specifying an end date or the number of recurrences. For example, if you specify the number of recurrences as 7, check-ins are scheduled every day for 7 days, starting from the first check-in date.
- Weekly recurrence: You can end the weekly recurrence by specifying an end date or the number of recurrences. For example, if you specify the number of recurrences as 4, check-ins are scheduled weekly once for 4 weeks, starting from the first check-in date.
- Monthly recurrence: You can choose to repeat the check-ins on a specific date or day of the month. For example, schedule a check-in on the 21st of every month or every second Monday of every month. You can end the monthly recurrence by specifying an end date or the number of recurrences.
- Yearly recurrence: Select the month when you want to schedule the first check-in, and then repeat the check-in on a specific date or day of that month. For example, schedule the first check-in on January 2 each year, or every first Monday of January each year. You can end the yearly recurrence by specifying an end date or the number of recurrences.

If an employee has multiple assignments, a manager can select the assignment relevant to the check-in.

As an employee, if you have multiple assignments that report to a single manager, you can select the assignment relevant to the check-in. If you have multiple managers, you can select the manager with whom you want to schedule the check-in. This includes matrix managers as well.

As an employee, you can view recurring check-ins in the **Events and interactions** timeline on your Touchpoints page.

As a manager, you can view recurring check-ins in the **Events and interactions** timeline on the Touchpoints page of the employee that you select.

> **Note:** When you schedule recurring check-ins, ensure that the dates of the check-ins don't conflict with already scheduled check-ins. If they conflict, and you proceed to create the recurring series, the conflicting check-ins aren't created as part of this series. However, the other check-ins that don't conflict are created in the series, and they appear in the **Events and interactions** timeline.When you schedule a recurring check-in, you can create a meeting invite. The ICS file will be automatically downloaded after you schedule the check-in, which you can then add to your calendar. The manager and employee receive a notification when a recurring series is scheduled.

Related Topics

- Manage a Recurring Check-In
- Manage Recurring Discussion Topics

Manage a Recurring Check-In

Here are a few points to consider when modifying or deleting a recurring check-in series:

Modify a Recurring Series

After creating a recurring series, you can change the frequency, start and end dates, or the number of occurrences in the series. You can make these changes to past and future checks-ins in the series. You can also add recurring discussion topics. But you can't change the assignment of the employee, when they have multiple assignments.

If your recurring check-in has a meeting invite, and you want to change the meeting invite details, you can choose to update the meeting invites in all the future check-ins, or make the update only in the current check-in.

When you change the frequency of a recurring check-in, meeting invites, if any, will get automatically updated and downloaded.

You can modify the series only if:

- You created it.
- The check-ins don't contain discussion topics that are marked as discussed.
- The check-ins don't contain notes added by others.

Delete a Recurring Series

You can choose to delete any check-in a series, or all check-ins in the series, only if you created the series. You can't delete a check-in if:

- It has discussion topics that are marked as discussed.
- It has discussion topics with notes added by others.

When deleting a recurring series, only the current and future check-ins are deleted, when they match the above conditions.

The manager and employee receive a notification when a recurring series is deleted.

Manage Recurring Discussion Topics

After creating a recurring check-in series, you can add recurring discussion topics to the check-ins in the series. You can also edit and delete the recurring discussion topics based on certain criteria.

Add Recurring Discussion Topics

Here are a few points to consider:

- A discussion topic added to the first check-in in a recurring series is automatically added to the rest of the check-ins in that series. This includes your own discussion topics as well as recommended topics related to goals, feedback, skills, competencies, or Insights.
- If you add notes to a discussion topic in the first check-in of a series, those notes aren't carried over to the same discussion topic that might be present in the other check-ins in the series. However, progress notes

added to skills and competencies are carried over to other check-ins in the series, wherever those skills and competencies are present in the series.

- Only two notes can be added to a discussion topic, one by the employee and another by the manager.

Edit Recurring Discussion Topics

When you edit a discussion topic in any check-in in a recurring series, these considerations apply:

- You have the option to carry over those edits to the same recurring discussion topic that might be present in the remaining check-ins.
- If you add a new discussion topic to a check-in, it's not carried over to the remaining check-ins.
- You can add your own discussion topics and goals, feedback, skills, competencies, or Insights topics from the **Recommended topics** panel to any check-in.

Delete Recurring Discussion Topics

You can delete a discussion topic from any recurring check-in in a series only if it meets these criteria:

- You created the discussion topic.
- It's not already marked as discussed.
- It doesn't contain notes added by others.

The manager and employee receive a notification when a recurring discussion topic is deleted.