

# Talent Management

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## **Touchpoints Questions and Answers**

**FA Latest**

Talent Management  
Touchpoints Questions and Answers

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## Get Help

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# Get Help

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# 1 Touchpoints Questions and Answers

## How do I configure a touchpoints check-in template?

While configuring the check-in template, you can include skills, competencies and questionnaire sections for workers and managers to be added as discussion topics.

1. Go to **My Client Groups** > **Performance**, scroll to the Setup Maintenance section and click **Check-In Templates**.
2. Click **Add** to create a new check-in template or search for an existing template.
3. Select the specific performance review periods from the **Review Periods** list to associate with the template. You can choose the **All Review Periods** or **Specific Review Periods** options. The **Select Review Periods** list appears if you choose a specific review period. See *Review Periods in Talent Management*.

**Note:** Dissociating a check-in template from a review period does not impact employees' existing check-in documents.

4. Select an appropriate choice as active or inactive for the status of the template in the **Status** list.

**Note:** You can specify or change review periods for an inactive check-in template. These review periods will become effective when the template is activated later.

5. Choose appropriate talent profile, position profile, and job profile competencies as discussion topics.
6. Click **Add Row** in the Eligibility Profile section to make the template available to eligible employees who meet one or more eligibility criteria.
7. Click the check box to make an eligibility profile required among the set of eligibility profiles you've selected.

**Note:** Ensure you schedule the eligibility batch process to assign check-in templates to eligible profiles.

8. Click **Submit**.

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.

### What to do next

You must run the eligibility batch process to determine eligible workers for check-in documents using eligibility profiles. To do so, use the Eligibility Batch Process task in the Setup Maintenance work area. See *Run the Eligibility Batch Process*.

### Related Topics

- [How do I enable a profile option?](#)

## How do I enable touchpoints check-in options?

Specify check-in options so that managers and employees can create, delete, and set check-ins as read-only or editable.

1. Go to **My Client Groups** > **Performance**, scroll to the Setup Maintenance section and click **Check-In Templates**.
2. Click **Add** to create a new check-in template or search for an existing template.

3. Select one or more options for a manager and employee in the Role actions section as shown in this table.

Role Actions	Description
Create Check-In	Employees or managers can create a check-in using this template.
Delete Check-In	Employees or managers can delete a check-in based on this template, but only the person who created the check-in can do so.
Make Check-In Read Only	Employees or managers can close check-ins based on this template.
Make Check-In Editable	Employees or managers can make a check-in editable again by reopening it.

4. Click **Submit**.

*Related Topics*

- [How do I configure a touchpoints check-in template?](#)
- [How do I enable a profile option?](#)

## What are the page properties to display or hide elements on a Touchpoints page?

Functional administrators use page properties in Oracle Visual Builder Studio (VB Studio) to extend Redwood pages.

Page properties play a crucial role in extensibility and are used for various purposes, for example, to reorder tabs or show or hide panels. You can access the list of available page properties for a particular page by navigating to the **Page Properties** pane in the Designer. Many page properties are available for various Redwood pages to ensure a diverse range of options to tailor the application to your specific needs.

In Touchpoints, you can display or hide the page elements by using the corresponding page property.

### Common Page Properties

Page	Page Element	Page Property	Description
Manager's Dashboard	Guided Journey on Summary tab	Show Journey on Summary Tab of Manager's Dashboard	This variable controls the display of the guided journey on the Summary tab of the manager's dashboard. Set it with the guided journey code available in the checklist template.
Manager's Dashboard	Guided Journey on Summary tab	Show Tasks on Summary Tab of Manager's Dashboard	This variable controls the display of the guided journey tasks at the page level. Set it with the task codes available in the checklist

Page	Page Element	Page Property	Description
			template. Use the comma as separator to display many tasks.
Manager's Dashboard	Guided Journey On Employees Tab	Show Journey on Employees Tab of Manager's Dashboard	This variable controls the display of the guided journey on the Employees tab of the manager's dashboard. Set it with the guided journey code available in the checklist template.
Manager's Dashboard	Guided Journey on Employees tab	Show Tasks on Employees Tab of Manager's Dashboard	This variable controls the display of the guided journey tasks at the page level. Set it with the task codes available in the checklist template. Use the comma as separator to display many tasks.
Employee's Touchpoints page	Events and interactions	Show Journey on Employee's Dashboard	This setting controls the display of the guided journey on the employee's dashboard. Set it with the guided journey code available in the checklist template.
Employee's Touchpoints page	Events and interactions	Show Tasks on Employee's Dashboard	<p>This variable controls the display of the guided journey tasks at the page level. Set it with the task codes available in the checklist template. Use a comma as separator to display multiple tasks.</p> <p>This variable works with the Show Journey on Employee's Dashboard setting to set the task code the guided journey.</p>

### **Pulse Survey Page Properties**

Page	Page Element	Page Property	Description
Manager's Dashboard	Spark Chart	Set High Score Threshold for Spark Chart on Employees tab	This setting controls the high survey score threshold for an employee's spark chart. The default value is 4.
Manager's Dashboard	Spark Chart	Set Medium Score Threshold for Spark Chart on Employees tab	This setting controls the medium survey score threshold for an employee's spark chart. The default value is 2.
Manager's Dashboard	Low Pulse Scores section	Show Low Pulse Scores Section on the Summary Tab and Pulse Scores on the Employees tab	This setting controls the display of the Low Pulse Scores section on the Summary tab of the manager's view. It also controls the display of pulse scores on the Employees

Page	Page Element	Page Property	Description
			tab of the manager's view. Set the value to true to display the section, else to false to hide it.
Manager's Dashboard	Pulse Score Comparison graph on the Summary tab	Show Pulse Score Comparison on the Summary tab	The graph is shown by default. To hide the graph, unselect this checkbox.

### Miscellaneous (Other) Page Properties

Page	Page Element	Page Property	Description
Manager's Dashboard	Dashboard	Show Schedule Check-In Feature for Manager	This property controls the display of the schedule check-in feature for the manager. Set it to True to display these elements: the <b>Schedule Check-In</b> menu item on the Employees tab, the <b>Schedule Check-In</b> button on the employee's Touchpoints page, and the Schedule Check-In link in the Overdue check-ins section on the Summary tab. Set it to False to hide them.
Manager's Dashboard and Employee's Touchpoints page	Use AI Assist button	Show Use AI Assist Button for Anytime Feedback	This setting controls the AI Assist feature in the Anytime Feedback panel. Set it to true to display the <b>Use AI Assist</b> button.
Manager's Dashboard and Employee's Touchpoints page	Recognition and Awards drawer	Show AI Assist for Recognition and Awards	This property controls the display of the <b>AI Assist</b> button on the Recognitions and Awards drawer.
Manager's Dashboard	Recognitions and Awards analytics on the Interactions graph and the list view of the graph	Show Recognitions and Awards in Interactions Graph and List View	The graph and list view are shown by default. To hide them, unselect this checkbox.
Manager's Dashboard	Feedback Received analytic on the Interactions graph and the list view of the graph	Show Feedback Received in Interactions Graph and List View	The graph and list view are shown by default. To hide them, unselect this checkbox.
Manager's Dashboard	Dashboard	Display Dashboard tabs	This setting controls the display and ordering of the tabs on the manager's dashboard.  For example, you can hide the Employees tab or move the Team Sync as the first tab.
Employee's Touchpoints page	Touchpoints Summary	Show Check-In Button for Employee	This property controls the display of the <b>Schedule Check-In</b> button on the employee's Touchpoints

Page	Page Element	Page Property	Description
			page. Set it to True to display the button or False to hide it.
Employee's Touchpoints page	Pulse score line graph	Show Pulse Survey Graph on the Employee page	The graph is shown by default. To hide it, unselect this checkbox.  This setting applies to both the manager's view of the employee's Touchpoints page and the employee's own Touchpoints page.
Employee's Touchpoints page	Recommendations for you drawer panel (which displays recommended nudges)	Show Recommendations for You	The panel is shown by default. To hide it, unselect this checkbox.  This setting applies to both the manager's view of the employee's Touchpoints page and the employee's own Touchpoints page.
Employee's Touchpoints page	Actions menu	Show Send Thank You Menu Item	This setting controls the display of the <b>Send Thank You</b> option on the Actions menu. The option is displayed by default. To hide the button, set it to false.
Employee's Touchpoints page	Events and interactions	Timeline Future Months to View	This setting controls the minimum date displayed in the events timeline viewport. The default value is 1 month from the current date.
Employee's Touchpoints page	Events and interactions	Timeline Past Months to View	This setting controls the minimum date displayed in the events timeline viewport. The default value is 3 months before the current date.
Employee's Touchpoints page	Touchpoints Summary	Select the display and order of in-app-navigation tabs	This setting controls the different in-app-navigation tabs and the order in which they are displayed on this page when 'showNavigator' page parameter value is true.

### Check-In Page Properties

Page	Page Element	Page Property	Description
Check-In Page	Save button	Hide Save Button on Check-In Page	This property controls the display of the Save button. To hide this button, select the checkbox. To display this button, unselect the checkbox.

Page	Page Element	Page Property	Description
Check-In Page	Contextual header on the page title	Show Labels in the Contextual Header Section	This property show or hides all the field labels in the contextual header section.
Check-In Page	Competencies tab on Discussions topics drawer	Hide Target Level Attribute on Competencies Tab	This property controls the display of the Target Level attribute for each competency on the Competencies tab of the Discussions topics drawer panel. To hide this attribute, select the checkbox. To display this attribute, unselect the checkbox.
Check-In Page	Competencies tab on Discussions topics drawer	Hide Proficiency Level Attribute on Competencies Tab	This property controls the display of the Proficiency Level attribute for each competency on the Competencies tab of the Discussions topic drawer panel. To hide this attribute, select the checkbox. To display this attribute, unselect the checkbox.

## How HR Specialist creates bulk check-in documents?

Here's how the HR Specialist performs mass actions on the Check-In Documents page:

1. Go to **My Client Groups > Performance**, scroll to the Administration section and click **Mass Actions Processes for Check-In Documents**.
2. Click **Actions > Create Check-Ins**.
3. Choose a date, frequency, review period, and check-in template.
4. Specify the manager type.
5. Select a choice in the **Population Type** drop down list.
6. Choose a reason and add a discussion topic.
7. Click **Submit**.

## How does an HR Specialist create check-ins for individual or group of employees?

Here's how the HR Specialist creates check-ins for individual or group of employees:

1. Go to **My Client Groups > Performance**, scroll to the Setup Maintenance section and click **Check-In Documents**.
2. Search for employees using these criteria: Review Period, Template, and Manager Type.
3. From the search results, choose the employees.

4. Click **Continue**.

**Note:** You can only choose thirteen employees at a time to create a check-in.

5. Choose a reason and add a discussion topic.

6. Click **Schedule**.

## How does an HR Specialist configure questionnaire responses?

Here’s how an HR Specialist configures the check-in template to hide questionnaire responses for a manager or employee when updating a check-in:

1. Go to **My Client Groups > Performance**, scroll to the Setup Maintenance section and click **Check-In Templates**.
2. Click **Add** to create a new check-in template or search for an existing template.
3. Select one or more options for a manager and employee in the Check-in content section as shown in this table.

Check-In Content Options	Description
Mark as done	Allow a manager or an employee to set a questionnaire as done.
Hide questionnaire from manager until mark as done	Hides the worker questionnaire from the manager until it is marked as done in the check-in document.
Hide questionnaire from worker until mark as done	Hides the manager questionnaire from the worker until it is marked as done in the check-in document.

4. Click **Submit**.

## How do I add questionnaire and goals as discussion topics when scheduling a check-in?

Here’s how the questionnaire, performance and development goals are automatically added as discussion topics when scheduling a check-in:

1. Go to **My Client Groups > Performance**, scroll to the Setup Maintenance section and click **Check-In Templates**.
2. Click **Add** to create a new check-in template or search for an existing template.

3. Select one or more options for a manager and employee in the Check-in content section as shown in this table.

Check-In Content Options	Description
Questionnaire	Specify a questionnaire for the employee and manager, or both.
Allow manager to see worker's questionnaire	Specify whether a manager can see their employees' questionnaire in a check-in.
Enable scoring	Enable scoring for the employee and manager questionnaire.
Allow worker to see own score	Indicate whether an employee can see their questionnaire score.
Allow manager to see worker's score	Enable a manager to see their employees' questionnaire score.
Allow worker to see manager's questionnaire	Specify whether an employee can see their manager's questionnaire.
Allow manager to see own score	Indicate whether a manager can see their questionnaire score.
Allow worker to see manager's score	Enable an employee to see their manager's questionnaire score.

4. Click **Submit**.

## How do I add suggested topics, performance, and development goals as discussion topics in a check-in?

1. Go to **My Client Groups > Performance**, scroll to the Setup Maintenance section and click **Check-In Templates**.
2. Click **Add** to create a new check-in template or search for an existing template.
3. Choose a review period to associate with the template.
4. Select one or more options in the Goals discussion topics and Suggested discussion topics sections of the Check-in Content area as shown in this table.

Discussion Topics	Description
Add default discussion topics for performance goals	Specify performance goals as discussion topics while scheduling check-ins.
Add default discussion topics for development goals	Specify development goals as discussion topics while scheduling check-ins.
Include AI related topics	Use Generative AI to suggest topics tailored to the employee's job profile, position profile, and department.

Discussion Topics	Description
Include nudges	Specify pending or overdue actions.
Include open topics from previous check-ins	Specify the number of past months to include as discussion topics.

5. Click **Submit**.

## What do I do if direct reports aren't displayed on Team Sync page?

Here are some points to consider when your direct reports aren't displayed on the Team Sync page:

- Verify the direct reporting relationships by confirming that your direct reports have assignments as their Line Manager or Supervisor correctly assigned and effective as of current date. If the reporting relationship is incorrect or not current, Team Sync will not display them.
- Check Team Sync role assignments and configurations by ensuring you have the correct Team Sync Agent role assigned in your security profile to view and manage your team in Team Sync. Confirm that Team Sync is enabled for your role and business unit.
- Delays in data synchronization or caching in Team Sync can cause reports not to appear immediately. Wait for a day or trigger a data refresh job if available.
- Check if any filters or custom views on the Team Sync Agent Page are applied that might exclude certain direct reports. Reset or clear filters and try again.
- Review Talent Profile Visibility by checking if Team Sync is integrated with Talent Profile data and by confirming access permissions to allow your view of direct reports' profiles.

## How does an HR Specialist enable adding attachments to a check-in?

Here's how an HR Specialist configures the check-in template to enable adding attachments to a check-in:

1. Go to **My Client Groups > Performance**, scroll to the Setup Maintenance section and click **Check-In Templates**.
2. Click **Add** to create a new check-in template or search for an existing template.
3. Enable the **Show Attachments** option in the Attachments section.
4. Click **Submit**.

## How does an HR Specialist enable uploading meeting transcripts?

Here's how an HR Specialist configures the check-in template to enable uploading a meeting transcript to a check-in:

1. Go to **My Client Groups** > **Performance**, scroll to the Setup Maintenance section and click **Check-In Templates**.
2. Click **Add** to create a new check-in template or search for an existing template.
3. Enable the **Upload meeting transcript** option in the Transcript section.
4. Click **Submit**.