Oracle Human Capital Management Cloud
Using Volunteering

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Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Using Applications Help

Use help icons 📚 to access help in the application. 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. Not all pages have help icons. You can also access Oracle Applications Help.

Watch: This video tutorial shows you how to find help and use help features.

You can also read Using Applications Help.

Additional Resources

- **Community**: Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.

- **Guides and Videos**: Go to the Oracle Help Center to find guides and videos.

- **Training**: Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

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<th>Convention</th>
<th>Meaning</th>
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<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
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Documentation Accessibility

For information about Oracle’s commitment to accessibility, visit the Oracle Accessibility Program website.

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.
Contacting Oracle

Access to Oracle Support
Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions
Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 My Volunteering

Overview of Volunteering

Volunteering in the corporate setup is an activity in which employees voluntarily opt in and offer their services to a non-profit project so that it benefits individuals or the community as a whole.

Employees navigate to Me > Volunteering to sign up and accept the terms and agreement. They can then:

- Select a cause
- Set volunteering goals
- Search and join volunteering projects as volunteers or project leads
- Create and submit volunteering organizations
- Create and submit volunteering projects
- Create or join a volunteering team
- Track their volunteering goal progress

Administrators navigate to My Client Groups > Volunteering to:

- Approve, reject, or return projects and organizations
- Create a cause
- Add projects and organizations
- Monitor Employer Identification Number (EIN) compliance for organizations
- Analyze participant feedback and ratings

Volunteering Projects

When you create a volunteering project, you associate the volunteering project to an organization and cause. If you’re a project lead, create volunteering projects from the Projects page. If you’re an administrator, create volunteering projects using Add Project on the Projects infotile.

Organizations

You can associate an organization with one or more volunteering projects. The organization, if based in the US should have a valid Employer Identification Number (EIN). Without a valid EIN, although the volunteering project can still be approved, it can lead to the organization’s rejection at a later point.

Duration

The volunteering activity can be a one-time effort like a blood donation camp or it can be recurring event like teaching. You can specify the date, duration, and recurrence based on the scope of the volunteering project.
Location
Indicate a primary location even though a volunteering project can conduct activities in more than one location. Volunteering projects in close proximity to a volunteer’s location appear in the recommended projects list.

Causes
You can associate a volunteering project with one or more causes. You select a predefined cause but if the administrator has configured additional causes, then those appear in the Causes list as well. Volunteering projects are recommended to volunteers based on the causes they select during initial sign up.

Benefits
Include details of the benefits such as refreshments, meals, T-shirts, or free admission that volunteers can avail if they participate in the volunteering project.

Specifications
Keeping the scope of the volunteering project and the tasks in mind, you can specify the number of guests, the minimum age requirement, and the items to bring for the volunteering activity.

Project Lead
Provide details of the project lead who will coordinate the efforts of the volunteer team. Project leads are involved in planning the tasks, notifying the volunteer team, and distributing the giveaways to volunteers.

Create a Volunteering Project
Employees who register as volunteers and administrators can create new projects and organizations. As an employee, you can create a new volunteering project from the Projects page. As an administrator, you can create a new volunteering project using Add Project in the Projects infotile.

Prerequisites
1. If you don’t plan to use an existing organization, then create a new organization and submit it for approval before creating the project. Although you can create an organization at the time of creating the volunteering project, if the organization fails EIN validation, then the volunteering project is inactivated.
2. Select and upload an image that you want to use as the cover for your volunteering project.

To create a volunteering project:
1. Click Add Project.
2. In the General Information page, select the organization or create a new one and enter the project name and description.
3. Browse and select the featured image that you want to add as the cover for the volunteering project and click Next.
4. In the Date and Time section, specify the registration deadline, start date, frequency, and project end date.
5. In the Location section, select the location where the volunteering activity will take place and click Next.
6. Select one or more causes associated to the volunteering project and click Next.
7. In the Additional Details page, specify the benefits provided to volunteers such as refreshments and project giveaways like T-shirts.
8. Specify the maximum and minimum capacity for the project and specify the minimum age for participants.
9. Enter the name and contact details of the person who will coordinate the volunteering activities.
10. Click Save and Submit.

**Add a Volunteering Organization**

Every volunteering project must be associated to an organization that’s the beneficiary of the volunteering project. As an employee, use **Create Organization** to create the organization when you create a volunteering project. As an administrator, you can use **Add Organization** to create a volunteering organization from the **Organization** infotile.

To add an organization:

1. In the Add Organization page, enter the Employer Identification Number.
2. Enter the organization name.
3. Specify the organization type.
4. Enter details describing the organization and its objectives.
5. Enter the mission statement for the organization.
6. In the Contact Information section, enter the contact details of the person who will coordinate the volunteering project.
7. Add the Logo of the organization.
8. Click Save and Submit

**Related Topics**

- What happens if a volunteering organization doesn't meet EIN compliance
2 Employee Volunteering

How You Collaborate on a Volunteering Project

If you registered for a volunteering project then you can use Discuss to invite others to collaborate on the volunteering project.

Examples of collaboration:

- A project lead shares related information on the volunteering project.
- A volunteer posts research findings or statistics related to a cause.

Collaborating on Volunteering Projects

Tips for collaborating:

- To get started, select a volunteering project and click Discuss from the Action menu to start a conversation.
- Everyone who has registered can view basic details of the volunteering project and post comments that all members can see.
- If you withdraw from the volunteering project, then the Discuss option also disappears from the Action menu.

Related Topics

- Create a Volunteering Project

Register for a Volunteering Project

As an employee, you register as a volunteer for a volunteering project from the Project Details page.

After you identify a volunteering project, for which you want to volunteer:

1. Click the Project Name to go to the Project Details page.
2. View the details regarding the start date and description
3. Click Volunteer. A confirmation message displays.

You can register for a volunteering project even if the capacity is full by registering and opting to be on the waitlist. When space becomes available, you will receive a confirmation. You can cancel your registration any time by withdrawing from the volunteering project.

Registering as Project Lead

When you register for a volunteering project, if the project has project lead position available, then you can opt to be the project lead. If you volunteer as a project lead, you have the additional task of coordinating volunteering activities, sending email blasts, and distributing T-shirts and certificates. You can cancel your registration any time by withdrawing from the volunteering project or you could withdraw only as project lead but continue as volunteer on the project.
How You Share Volunteering Updates in Social Networking Sites

Share updates from your volunteering project on your social networking profile. Although you configure the setting in Volunteering, you connect to the Reputation Management application to share the updates in social networking sites.

Connect to Social Network

Manage your social media preferences in the Social Media Preferences info tile in Volunteering. This opens the Preferences page which lists social networking sites such as Facebook, LinkedIn, or Twitter that you can connect to for the updates. The Allow updates from volunteering setting if enabled allows you to post an update with details of your volunteering project on the selected social networking site.

FAQs for Employee Volunteering

What's the difference between upcoming projects and recommended projects?

Recommended projects are projects that are up for selection based on your preferences for location and cause, whereas upcoming projects are projects you signed up for or projects which you created.

How can I log hours for my volunteering project?

To log hours, in the My Volunteering page click Volunteering Hours to go to the Volunteering History page. Then, select your volunteering project and click Enter Hours or add hours to the existing time entered for your project.

What happens if I don't meet the hours I set in my volunteering goal?

If you don’t meet the hours you set in your volunteering goal, the remaining time from your volunteering goal displays in the Volunteering History page. When you specify the hours for volunteering, you must update time spent on volunteering projects regularly. This helps you keep track of your goal progress.
What's the difference between the volunteer and project lead roles?

If you’re a project lead, you have the additional task of coordinating volunteering activities, sending email blasts, and distributing giveaways such as T-shirts and certificates. If you’re a volunteer then you don’t have these additional tasks.

If you indicate your preference for the project lead role during initial registration, then volunteering projects that require project leads appear in your Recommended Projects section.

Can I delete a volunteering project that I create?

No, you can't delete a volunteering project. Only administrators have the rights to delete a volunteering project.

How can I engage and collaborate with other volunteers on a volunteering project as a project lead?

Use these options to collaborate with other volunteers:

- Discuss your project to start a conversation on your volunteering project. All employees who register for the volunteering project can use this option.
- Email volunteers of upcoming volunteer tasks and activities. This option is available only to team leads and administrators.

How can I add an image to my volunteering project?

When you create a volunteering project, you can add an image that will appear as the cover for the volunteering project. You can add only one image for a volunteering project.

To add an image:

1. In the Create Project page, click Featured Image.
2. Click Browse to select and upload the image.
3. When uploading the image:
   - Ensure that the file size is less than 5 megabytes.
   - Upload an image in either .png, .tiff, or .jpeg file format.
   - Ensure that the image dimension is approximately 1560 x 435 pixels to help reduce distortion.
4. Preview the image.
5. Click Save and Close.
3 Team Volunteering

Team Volunteering

Team volunteering enables you to join a team and volunteer for a project as a team. On the My Teams page, search and select a team that you want to join or create a team and invite others to join your team.

In team volunteering, the key aspects to consider are:

- Member role
- Selecting a volunteering project
- Setting team goal
- Tracking team progress

Member Role

The role that you take on in a team is either that of leader or member. If you create a team you automatically become the leader. Team leads can change the role of a member in the team by editing the team. As a leader or member you can invite your team for a volunteering project.

Selecting a Volunteering Project

You can select any approved volunteering project for your team. As a leader or member you can search for a volunteering project and add the volunteer team to that project. If you belong to multiple teams, you can select more than one team to volunteer for the project.

Setting Team Goal

Based on the scope of the volunteering project, you specify the volunteering goal hours for the team and invite team members to join the project. Members from the selected teams are notified and they register for the volunteering project, if interested.

Tracking Team Progress

When members log hours for a team volunteering project, it’s reflected in the team’s progress summary. The summary provides each volunteer member’s contribution in achieving the team goal.

How You Challenge Other Volunteering Teams

As the member of a volunteering team, you can challenge other teams to a team challenge. To do so, select the Challenge a Team action, this action is available only to team leads.
Challenging Other Teams

If you belong to multiple teams, any of your teams can send volunteering challenges to other teams.

Accepting or Declining a Challenge

When you challenge a team, the project lead of that team can either accept or decline the challenge. Once a challenge is accepted, the team members get to view the challenge information on their project details page. They can then choose to register for the project. The project lead can withdraw from a challenge after having accepted it.

Tracking Team Progress

You log hours for the project based on the goal hours your project lead has specified for the team. Team leads track the progress of their team in the View Progress page.
4 Volunteering Administration

Volunteering Administration Components

The key administration components in Volunteering are: organizations, causes, projects, feedback, insights, and settings. You create and approve a volunteering project that’s associated to an organization. The volunteering project can focus on a single cause or several causes and seek support in those areas.

Organizations

An organization is an entity that benefits from the volunteering project and it’s activities. An organization if it’s based in the US must have a valid Employer Identification Number (EIN) to validate it’s tax accounts against data from the IRS. The EIN isn’t mandatory for organizations that are based outside of the US. The following details are mandatory to create an organization:

- A unique name
- Nine-digit EIN number
- Description
- Contact

Projects

A volunteering project can be a one-time effort or span several months. To generate interest and seek support, you send email blasts about the volunteering project. The following details are mandatory to create a volunteering project:

- A unique project name
- Description
- Organization
- Cause
- Start date and duration
- Location
- Project lead contact details
- Minimum participants
- Minimum age requirement for participants

Causes

Every volunteering project must support a cause. There are eight causes available in the application. If you define additional causes, then those are available for selection. A volunteering project can support more than one cause at a time.

Project Feedback

Improve the volunteering experience based on ratings that volunteers provide for project leader, project experience, and organization.
Insights
Gain insights into the impact and reach of various volunteering projects using the graphical charts for volunteer participation rate. It also helps you analyze the distribution of volunteering projects by cause, project, and organization.

Settings
The success of a volunteering project depends on how it’s presented and how the message is conveyed to volunteers. Configure the branding, news and announcements, user agreement, and EIN validation schedule.

Related Topics
- Volunteering Projects

How You Assess Volunteering Projects
On completing a volunteering project, volunteers can submit a survey to rate the volunteering project. Volunteers use Rate Project to assess and provide their rating of completed volunteering projects. As an administrator, you can view the available ratings on the Project Feedback infotile. The number of highly rated and rated volunteering projects are available on the infotile.

Volunteer ratings help you obtain the volunteering team’s perspective on a volunteering project. Volunteers provide their rating to questions on the:
- Project Leader
- Project Experience
- Organization

You can use the filter to search for organizations with a four star rating or search for a project that has high ratings for the project lead.

How You Configure Settings for Volunteering Features
Use the Settings infotile in the My Administration work area to add and update the volunteering features that appear on the employee My Volunteering page. You also schedule the Employer Identification Number (EIN) validation run from this page to help review organizations submitted for your approval.

The features you can configure include:
- Background Image
- Headlines
- User Agreement
- Causes
- EIN Validation Scheduler
Background Image
Add a background image that reflects the cause or will help volunteers associate the volunteering project with the cause. Select **Upload** and add the background image that employees view on the Welcome page when they log into the application.

Headlines
Provide volunteers with updates on various volunteering projects. You can configure only five headlines that will appear in the My Volunteering page.

Causes
Add a cause other than those already specified to meet your organization’s requirements. A new cause that you add appears in the Select Causes list.

EIN Validation
Schedule the EIN validation run to either On or Off. When enabled, the EINs of organizations submitted for approval are validated against the list of EINs in the IRS website. If you don’t want to use the scheduled validation run, use Validate Now to perform an immediate validation.

User Agreement
Specify the terms and conditions that employees will review and accept as part of the registration process.

How You Review Volunteering Projects
You can view periodical information on volunteer participation across causes, organizations, and projects using the **Insights** infotile. The data is applicable to past and upcoming projects.

You can gather the following information from the graphical charts:

- Overall Participation Rate - percentage of employees participating in volunteering projects when compared to percentage of the total workforce
- Projects by Organizations - percentage of ongoing and upcoming volunteering projects associated to various organizations.
- Projects by Cause - distribution of volunteering projects by cause.
- Projects by Participation Rate - volunteering projects with highest and lowest participation rates
Enable Oracle Social Network for Volunteering

For users to collaborate on volunteering projects, enable Oracle Social Network conversation settings.

To enable Oracle Social Network conversation settings:

1. In the Setup and Maintenance work area, go to the following:
   - Functional Area: Application Extensions
   - Task: Manage Oracle Social Network Objects
3. In Corporate Social Responsibility, select each object to display the attributes.
4. In the Attributes section, click Add to select and enable the attributes.
5. Click Enable Object and select Automatic.
6. Click Save and then Synchronize to update the changes.

To validate the changes, select an approved volunteering project and click Discuss from the menu to verify if the Oracle Social Network pane is displayed.

Related Topics

- How You Collaborate on a Volunteering Project

How You Generate Notifications for Work Life Cloud Service Applications

Use the **Generate Notifications for Work Life Cloud Application** process to generate notifications for Work Life Cloud Service applications. The applications include Employee Wellness, Volunteering, and Workforce Reputation Management. By default, the process is scheduled to run every 2 hours but you can change this frequency. However, you can’t specify a different frequency for each application.

Use the **Scheduled Processes** work area to schedule and run the process.

FAQs for Volunteering Administration

What happens if a volunteering organization doesn't meet EIN compliance?

An organization based in the US requires an EIN when it’s submitted for approval. The EIN is then validated and if it's not compliant, Invalid EIN displays next to the organization name. Even though an organization has Invalid EIN status, administrators can still approve or reject the organization during the approval process.
Can I edit a volunteering organization after it's approved?

Yes, you can do so using Edit on the Organizations page in My Administration. As an administrator, you can edit all the details of an approved organization except the organization name and the EIN. You don't need to get these subsequent changes approved through an approval process.

How can I activate a volunteering project that's inactivated?

You can select the volunteering project and use the action drop-down list to select Activate. You will be able to activate only a upcoming volunteering project and if the organization with which it's associated, is approved and activated.

Can I approve a volunteering project that I create?

No, you can't approve a project that you create. Only another administrator can approve the project.

How can I configure address fields when specifying location for a volunteering project or organization?

You can configure addresses using the TCA address component. You can enable and disable fields for a country.