

# Oracle Fusion Cloud Human Resources

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## **Administering and Using Oracle Me Applications**

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# 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

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.

## Get Support

You can get support at [My Oracle Support](#). For accessible support, visit [Oracle Accessibility Learning and Support](#).

## 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.

## Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program](#). Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

## 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](mailto: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
Workforce Recognition and Award Program Administrator ORA_CEL_WORKFORCE_RECOGNITION_AND_AWARD_PROGRAM_ADMINISTRATOR_JOB	Global settings	<b>Navigator &gt; My Client Groups &gt; Show More &gt; Configure Global Settings</b> under Celebrate.
	Programs	<b>Navigator &gt; My Client Groups &gt; Show More &gt; Configure Programs</b> under Celebrate.
Employee ORA_PER_EMPLOYEE_ABSTRACT	<ul style="list-style-type: none"> <li>• Recognize your peers.</li> <li>• View and respond to the recognitions happening around you.</li> </ul>	<b>Navigator &gt; Me &gt; Show More &gt; Celebrate</b> 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.

### 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 enables employees to appreciate the contributions and achievements of their colleagues.

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

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

Recognition programs have a start and an end date. A recognition program contains rules that enable you to determine:

- Usage of reward points.
- Core values that employees can use as a basis to appreciate their colleagues.
- Images that employees can include in their recognitions.

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.

## 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. 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.



# 3 Connections

## Configure Connections

### Set Up Connections

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

- Enable unified sandboxes and the Workforce Deployment to view the profile options for Connections.
- 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
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 ESS process for each of the listed indices.

Job Name	Parameter Name	Parameter Value
ESS job 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
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

### 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.

## 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 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.
- **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.



# 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 optimal 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

### Implement Oracle Grow

To implement Oracle Grow, you need to have these products and features enabled:

- Required:
  - Oracle Learning: Oracle Grow uses this to provide learning suggestions. For details, see *Implementing Learning*.
- Recommended:

- Oracle Dynamic Skills: Oracle Grow provides development and growth recommendations based on the skill set you're looking to develop. For details, see *Implementing Dynamic Skills*.
- Career Development: Oracle Grow provides a comprehensive view of an employee's career information. For details, see *Implementing Career Development*.
- Profile Management: Oracle Grow takes input about an employee's skills, competencies, and accomplishments from their talent profile. For details, see *Profile Management*.
- Optional:
  - 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. For details, see *How You Use Journeys* and <https://www.oracle.com/pls/topic/lookup?ctx=fa23d&id=u30241674>.
  - Opportunity Marketplace: Oracle Grow suggests learning recommendations for the jobs and gigs that you're interested in. For details, see *What is Opportunity Marketplace*.
  - Oracle Recruiting Cloud: Opportunity Marketplace is available in Oracle Recruiting Cloud. For details, see *Implementing Recruiting*.
  - Connections: Add favorite connections and view popular connections in Oracle Grow. For details, see *Connections*.

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

## How Oracle Grow Works with Learning

Oracle Learning is a prerequisite for using Oracle Grow. Here's what employees can do when when you implement Oracle Learning:

- Get relevant learning recommendations on their Oracle Grow page. Employees can follow learning topics for Oracle Grow to get course suggestions that help them master the topics they're interested in.
- View and track the progress of their current learning.
- Fill any profile gaps, and develop skills and competencies when they complete learning recommendations.

## How Oracle Grow Works with Career Development

As an employee, use Oracle Grow to decide how you want to develop in your role and grow your career.

The Oracle Grow page is built around your role and your skills, and helps you design your career path. If you've implemented Career Development and Profile Management, you can see your current role and career path on the Grow page.

## How Oracle Grow Works with Dynamic Skills

Dynamic Skills is a key component of Oracle Grow. Implementing Dynamic Skills helps Oracle Grow in:

- Providing learning recommendations for the skills that you add in Skills Center.
- Suggesting skills that are popular among your peers. You can choose to add it the skills you're proficient in or add it to the list of skills you want to develop using the skill detail page.
- Recommending skills for your current job role and title, ranked by occurrence across the application.
- Suggesting skills that are popular among people who are interested in the same careers as you. This helps you get an insight into the skills that are required for your career growth.

## How Oracle Grow Works with Opportunity Marketplace

Using Opportunity Marketplace helps Oracle Grow in:

- Providing learning recommendations for the jobs and gigs that you mark as favorites in Opportunity Marketplace.
- Suggesting gigs and jobs that are popular among your peers. You can look at the job and gig details and mark them as favorites if they're relevant for you.
- Suggesting jobs and gigs that are popular among people who are interested in the same careers as you. This lets you gain competencies for the jobs that align with your careers of interest.

## Configuring Products for Grow Features

To display data in each section in Grow, some administrator and employee self-service tasks must be completed.

Here are the initial, one-time setup tasks that an administrator needs to complete for each of the following products.

### Journeys

- Ensure that these profile options are enabled:
  - ORA\_FND\_SEARCH\_EXT\_ENABLED
  - ORA\_PER\_CHK\_ORACLE\_SEARCH\_INDEX\_ENABLED
  - ORA\_PER\_CHK\_ORACLE\_SEARCH\_DIRECT\_INGEST\_ENABLED
  - ORA\_PER\_JOURNEYS\_ENABLED
  - ORA\_PER\_CHK\_ORACLE\_SEARCH\_UI\_ENABLED
  - ORA\_PER\_ORACLE\_SEARCH\_WORKERSLOV\_ENABLED
  - HRC\_ELASTIC\_SEARCH\_ENABLED

- Run these scheduled processes:

Name of the Process	Parameters
ESS job to create index definition and perform initial ingest to OSCS	<ul style="list-style-type: none"> <li>◦ fa-hcm-workerjourney</li> <li>◦ fa-hcm-workerjourneytask</li> </ul>
Compute Users ACL	None

### Career Development

- Ensure that these profile options are enabled:
  - HRC\_ELASTIC\_SEARCH\_ENABLED
  - ORA\_FND\_SEARCH\_EXT\_ENABLED
  - ORA\_HRD\_EXPLORE\_CAREERS\_ORACLE\_SEARCH\_ENABLED
  - HRT\_PROFILE\_ORACLE\_SEARCH\_ENABLED
- Run this scheduled process:

Name of the Process	Parameter
ESS job to create index definition and perform initial ingest to OSCS	fa-hcm-modelprofile

### Learning

- Ensure that these profile options are enabled:
  - HRC\_ELASTIC\_SEARCH\_ENABLED
  - ORA\_WLF\_ORACLE\_SEARCH\_LEARNINGRECOMMENDATION\_ENABLED
- Run this scheduled process as a one-time setup or when required:

Name of the Process	Parameter
ESS job to create index definition and perform initial ingest to OSCS	fa-hcm-learningitem

- Run this scheduled process when required to refresh recommendations:

Name of the Process	Parameter
ESS job to create index definition and perform initial ingest to OSCS	fa-hcm-learningrecommendation

### Connections

These steps are part of setting up the search feature in Connections:

- Ensure that these profile options are enabled:
  - ORA\_FND\_SEARCH\_EXT\_ENABLED
  - HRC\_ELASTIC\_SEARCH\_ENABLED
- Ensure that one of these profile options is enabled:
  - ORA\_PER\_ORACLE\_SEARCH\_WORKERSLOV\_ENABLED
  - HCM\_CONNECTIONS\_ENABLED
  - FUSION\_APPS\_SEARCH\_ENABLED
  - ORA\_HRM\_ENABLE\_SUCCESSION\_ORG\_CHART
- Run this scheduled process:

Name of the Process	Parameter
ESS job to create index definition and perform initial ingest to OSCS	fa-hcm-person

### Opportunity Marketplace

- Ensure that these profile options are enabled:
  - ORA\_HCM\_OPP\_MARKET\_PLACE\_GIGS
  - ORA\_HCM\_OPP\_MARKET\_PLACE\_JOBS

In addition to the above, you need to complete these tasks as well:

- *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*

## Additional Set Up for Career Interests and Objectives

In addition to the initial setup tasks, here are the other tasks that need to be completed to enable data in the Career Interests and Objectives side panel:

Career Interests and Objectives	Product Requirements	Additional Setup Tasks
Explore your career path	Career Development	HR specialist task: <ul style="list-style-type: none"> <li>• Define a job model profile from <b>My Client Groups &gt; Profiles &gt; Model Profiles</b>.</li> <li>• Add skills to the <b>Skills Center</b> content section of the job model profile. At a minimum, mark one or more skills as Required.</li> </ul>

Career Interests and Objectives	Product Requirements	Additional Setup Tasks
		<ul style="list-style-type: none"> <li>Define an employee's career progression path using the <b>Manage Jobs</b> task in Setup and Maintenance. Note that you can create only one career progression path for a job role.</li> </ul>
Skills	Dynamic Skills	<p>Employee task:</p> <ul style="list-style-type: none"> <li>Choose skills that you already have or are developing for your current role. Click the <b>Skills</b> link or go to <b>Me &gt; Skills Center</b> to choose these skills.</li> </ul>
Learning topics	Learning	<p>Employee task:</p> <ul style="list-style-type: none"> <li>Choose learning topic communities to follow. Click the <b>Learning topics</b> link, select the learning community you're interested in and click the <b>Follow</b> icon. When an employee follows a learning community, they become a member of the community.</li> <li>Or, you can also join a topic community from Learning. Go to <b>Me &gt; Learning</b>, click <b>Search</b> and select the Learning type as <b>Learning Community</b>. Select a learning community you're interested in, click <b>Learn More</b> and then click <b>Join</b>.</li> </ul>
Careers of interest	Career Development	<p>Employee task:</p> <ul style="list-style-type: none"> <li>Choose careers of your interest. To do so, click the <b>Careers of interest</b> link and search for careers in the Explore Careers page. When you find a career you're interested in, click <b>Add to Careers of Interest</b>.</li> </ul>
Gigs	Opportunity Marketplace	<p>Employee task:</p> <ul style="list-style-type: none"> <li>Choose favorite gigs by clicking the <b>Gigs</b> link. Select a gig that you're interested in, and click <b>Add to Favorites</b> from the <b>Actions</b> menu.</li> <li>Or, you can search for gigs in <b>Me &gt; Opportunity Marketplace</b> (use the <b>Opportunity</b> filter on the <b>Explore</b> tab) and add them as favorites from the <b>Actions</b> menu. The posting date of these gigs must be less than six months from the current date.</li> </ul>
Jobs	Opportunity Marketplace	<p>Employee task:</p> <ul style="list-style-type: none"> <li>Choose favorite jobs by clicking the <b>Jobs</b> link. Select a job that you're interested in, and click <b>Add to Favorites</b> from the <b>Actions</b> menu.</li> <li>Or, you can search for jobs in <b>Me &gt; Opportunity Marketplace</b> (use the <b>Opportunity</b> filter on the <b>Explore</b> tab) and add them as favorites from the <b>Actions</b> menu. The posting date of these jobs must be less than six months from the current date.</li> </ul>
Connections	Connections	<p>Administrator task:</p> <p>To enable the favorite feature in Connections:</p> <ul style="list-style-type: none"> <li>Grant the Access Career Growth by Worker privilege to the employee role.</li> </ul> <p>Employee task:</p> <ul style="list-style-type: none"> <li>Add an employee as a favorite. Go to <b>Me &gt; Connections</b>, search for the employee, and click the <b>Favorite</b> icon in their profile.</li> </ul>



## 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
Tasks to finish	Journeys	<p>Manager or employee task:</p> <ul style="list-style-type: none"> <li>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 Related Topics.</li> </ul>
Current learning	Learning	<p>Employee task:</p> <ul style="list-style-type: none"> <li>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 Related Topics.</li> </ul>
Suggested learning for you	Learning	<p>Administrator task:</p> <p>Run the scheduled process, <b>Recommend the Most Popular Learning</b>, with the recommendation category:</p> <ul style="list-style-type: none"> <li>Recommendations for current job gaps</li> <li>Recommendations for your manager assigned skills</li> </ul> <p>If any learning items match the criteria specified in this process, those learning items appear here.</p> <p>Or, you can recommend any learning item manually to have it appear in this feed. To do so, follow these steps:</p> <ol style="list-style-type: none"> <li>Go to <b>My Client Groups &gt; Learning</b> and select a learning item, <b>Courses</b>, for example.</li> <li>On the Courses page, select the course that you want to recommend.</li> <li>Click <b>Learners</b> from the side panel, and then select <b>Recommendation</b> from the <b>Add Learners</b> menu.</li> <li>Select the recommendation category as <b>Recommendations for current job gaps</b> or <b>Recommendations for your manager assigned skills</b>, and click <b>Next</b>.</li> <li>Add the name of the employee, and click <b>Submit</b>.</li> </ol> <p>These steps trigger the <b>Process Learning Recommendations</b> job which creates the learning recommendation.</p>
Current development journeys	Journeys	<p>Manager or employee task:</p> <ul style="list-style-type: none"> <li>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 Related Topics.</li> </ul>
Recommended development journeys	Journeys	<p>Administrator task:</p> <ul style="list-style-type: none"> <li>Add this functional privilege to the custom employee role and regenerate the role: PER_VIEW_GLOBAL_JOURNEYS_PRIV.</li> </ul>

Excel in Your Current Role	Product Requirements	Additional Setup Tasks
New learning in topics you follow	Learning	<p>Employee task:</p> <ul style="list-style-type: none"> <li>Follow a learning community. Click the <b>Learning topics</b> link from the side panel in Grow, select the learning community you're interested in, and click the <b>Follow</b> icon.</li> </ul> <p>Administrator task:</p> <ul style="list-style-type: none"> <li>Add featured learning items or new learning items to the learning community followed by the employee. To do so, go to <b>My Client Groups &gt; Learning &gt; Communities</b>. Search for a topic community, open it and click <b>Catalog</b> 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 <b>Add to Featured</b>.</li> </ul>
Suggested learning for your skills	Learning, Career Development	<p>HR Specialist or Administrator task:</p> <ul style="list-style-type: none"> <li>Define a job model profile from <b>My Client Groups &gt; Profiles &gt; Model Profiles</b> for the employee's role.</li> <li>Add skills to the Skills Center content section of the job model profile. At a minimum, mark one or more skills as Required.</li> <li>Ensure that these required skills are present in the Learning Outcomes section of a learning item. For details on adding learning outcomes, see Related Topics.</li> </ul>
Learning based on your favorite gigs	Learning, Opportunity Marketplace	<p>Employee task:</p> <ul style="list-style-type: none"> <li>Choose favorite gigs by clicking the <b>Gigs</b> link on the side panel in Grow. Select a gig that you're interested in, and click <b>Add to Favorites</b> from the <b>Actions</b> menu.</li> </ul> <p>Administrator task:</p> <ul style="list-style-type: none"> <li>Add skills to the favorite gigs. These skills must match the skills marked as Required in the job model profile for the employee's role.</li> <li>Ensure that one or more skills added to the favorite gigs are present in the Learning Outcomes section of a learning item.</li> </ul> <p>For details on these tasks, see Related Topics.</p>
Popular learning among your peers	Learning	<p>Administrator task:</p> <p>Run the process, <b>Recommend the Most Popular Learning</b>, with the recommendation category, Popular with managers and peers. If any learning items match the criteria specified in this process, those learning items appear here.</p> <p>Or, you can recommend any learning item manually to have it appear in this feed. To do so, follow these steps:</p> <ol style="list-style-type: none"> <li>Go to <b>My Client Groups &gt; Learning</b> and select a learning item, <b>Courses</b>, for example.</li> <li>On the Courses page, select the course that you want to recommend.</li> <li>Click <b>Learners</b> from the side panel, and then select <b>Recommendation</b> from the <b>Add Learners</b> menu.</li> <li>Select the recommendation category as <b>Popular with managers and peers</b>, and click <b>Next</b>.</li> <li>Add the name of the employee, and click <b>Submit</b>.</li> </ol> <p>These steps trigger the <b>Process Learning Recommendations</b> job which creates the learning recommendation.</p>

Excel in Your Current Role	Product Requirements	Additional Setup Tasks
Popular in your role: Learning items	Learning	<p>Administrator task:</p> <p>Run the process, <b>Recommend the Most Popular Learning</b>, with the recommendation category, Popular with others in your job.</p> <p>If any learning items match the criteria specified in this process, those learning items appear here.</p> <p>Or, you can recommend any learning item manually to have it appear in this feed. To do so, follow these steps:</p> <ol style="list-style-type: none"> <li>1. Go to <b>My Client Groups &gt; Learning</b> and select a learning item, <b>Courses</b>, for example.</li> <li>2. On the Courses page, select the course that you want to recommend.</li> <li>3. Click <b>Learners</b> from the side panel, and then select <b>Recommendation</b> from the <b>Add Learners</b> menu.</li> <li>4. Select the recommendation category as <b>Popular with others in your job</b>, and click <b>Next</b>.</li> <li>5. Add the name of the employee, and click <b>Submit</b>.</li> </ol> <p>These steps trigger the <b>Process Learning Recommendations</b> job which creates the learning recommendation.</p>
Popular in your role: Learning topic communities	Learning	<p>Administrator task:</p> <p>Run the process, <b>Recommend the Most Popular Learning</b>, with the recommendation category, Topics popular in my role.</p> <p>If any topic communities match the criteria specified in this process, those appear here.</p> <p>Or, you can recommend any topic community manually to have it appear in this list. To do so, follow these steps:</p> <ol style="list-style-type: none"> <li>1. Go to <b>My Client Groups &gt; Learning</b> and select <b>Learning Assignments</b>.</li> <li>2. Select <b>Recommendation</b> from the <b>Add Learners</b> menu.</li> <li>3. On the Recommend Learning page, click <b>Select Item</b>.</li> <li>4. Search for the topic community that you want to recommend.</li> <li>5. Click <b>Add Item</b> on the topic community.</li> <li>6. Select the recommendation category as <b>Topics popular in my role</b>, and click <b>Next</b>.</li> <li>7. Add the name of the employee, and click <b>Submit</b>.</li> </ol> <p>These steps trigger the <b>Process Learning Recommendations</b> job which creates the learning recommendation.</p>
Popular in your role: Skills	Dynamic Skills	<p>Administrator task:</p> <ul style="list-style-type: none"> <li>• Enable the profile option ORA_HRT_AI_SKILLS_ASSISTANT.</li> </ul> <p>This generates skill recommendations based on the employee's job role in Skills Center. The first 12 skills from these recommendations appear here.</p>
Popular in your role: Gigs	Opportunity Marketplace	<ul style="list-style-type: none"> <li>• 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 in their Recommended gigs list. The posting date of the gigs must be less than six months from the current date.</li> <li>• The skills defined in the Skill Center section of the job model profile for the employee's role must match the skills in the trending gig.</li> </ul>

Excel in Your Current Role	Product Requirements	Additional Setup Tasks
		<ul style="list-style-type: none"> <li>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.</li> </ul>
Popular in your role: Development journeys	Journeys	<ul style="list-style-type: none"> <li>The most commonly assigned journeys of the category, Career Development, appear here.</li> </ul>
Popular in your role: Connections	Connections, Learning Optional: Opportunity Marketplace	<ul style="list-style-type: none"> <li>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.</li> </ul>

*Related Topics*

- [How You Create Journeys](#)
- [How You Assign Journeys](#)
- [Create a Gig Using Opportunity Marketplace](#)
- [Suggested Skills to Set as Learning Outcomes](#)
- [Search and Browse the Learning Catalog](#)

## 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
Suggested learning for your careers of interest	Career Development, Learning Optional: Opportunity Marketplace, Recruiting, Dynamic Skills	Employee task: <ul style="list-style-type: none"> <li>Choose your careers of interest. Click the <b>Careers of interest</b> link on the side panel in Grow and search for careers. When you find a career you're interested in, click <b>Add to Careers of Interest</b>.</li> </ul> Administrator task: <ul style="list-style-type: none"> <li>Define a job model profile for the employee's career of interest from <b>My Client Groups &gt; Profiles &gt; Model Profiles</b>.</li> <li>Add skills in the Skill Center section of the job model profile and mark those skills as Required.</li> <li>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 Related Topics.</li> </ul>
Suggested learning for your skills	Learning Optional: Opportunity Marketplace, Recruiting, Career Development	Administrator task: <ul style="list-style-type: none"> <li>Define a job model profile for the employee's current role from <b>My Client Groups &gt; Profiles &gt; Model Profiles</b>.</li> </ul>

Grow Your Career	Product Requirements	Additional Setup Tasks
		<ul style="list-style-type: none"> <li>• Add skills in the Skills Center content section and don't mark them as Required. These optional skills will be considered for this feed.</li> <li>• 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 Related Topics.</li> </ul>
Learning based on your favorite gigs	Opportunity Marketplace, Dynamic Skills, Learning	<p>Employee task:</p> <ul style="list-style-type: none"> <li>• Choose favorite gigs. Click the <b>Gigs</b> link on the side panel in Grow, select a gig that you're interested in and click <b>Add to Favorites</b> from the <b>Actions</b> menu.</li> </ul> <p>Administrator task:</p> <ul style="list-style-type: none"> <li>• Add skills to the favorite gigs. These skills must match the skills that aren't marked as Required in the job model profile for the employee's role.</li> <li>• Ensure that one or more skills added to the favorite gigs are present in the Learning Outcomes section of a learning item.</li> </ul> <p>For details on these tasks, see Related Topics.</p>
Learning related to your favorite jobs	Opportunity Marketplace, Dynamic Skills, Learning	<p>Employee task:</p> <ul style="list-style-type: none"> <li>• Choose favorite jobs. Click the <b>Jobs</b> link on the side panel in Grow, select a job that you're interested in and click <b>Add to Favorites</b> from the <b>Actions</b> menu.</li> </ul> <p>Administrator task:</p> <ul style="list-style-type: none"> <li>• Add skills to the favorite jobs. The skills added to the job must match the skills that aren't marked as Required in the job model profile for the employee's role.</li> <li>• Ensure that one or more skills added to the favorite jobs are present in the Learning Outcomes section of a learning item.</li> </ul> <p>For details on these tasks, see Related Topics.</p>
Popular for your careers of interest: Learning items	Career Development, Learning	<p>Employee task:</p> <ul style="list-style-type: none"> <li>• Choose your careers of interest. Click the <b>Careers of interest</b> link on the side panel in Grow and search for careers. When you find a career you're interested in, click <b>Add to Careers of Interest</b>.</li> </ul> <p>Administrator task:</p> <p>Run the process, <b>Recommend the Most Popular Learning</b>, with the recommendation category as: Popular with others in your careers of interest. If any learning items match the criteria specified in this process, those learning items appear here.</p> <p>Or, you can recommend any learning item manually to have it appear in this feed. To do so, follow these steps:</p> <ol style="list-style-type: none"> <li>1. Go to <b>My Client Groups &gt; Learning</b> and select a learning item, <b>Courses</b>, for example.</li> </ol>

Grow Your Career	Product Requirements	Additional Setup Tasks
		<ol style="list-style-type: none"> <li>2. On the Courses page, select the course that you want to recommend.</li> <li>3. Click <b>Learners</b> from the side panel, and then select <b>Recommendation</b> from the <b>Add Learners</b> menu.</li> <li>4. Select the recommendation category as <b>Popular with others in your careers of interest</b> and click <b>Next</b>.</li> <li>5. Add the name of the employee and click <b>Submit</b>.</li> </ol> <p>These steps trigger the <b>Process Learning Recommendations</b> job which creates the learning recommendation.</p>
Popular for your careers of interest: Skills	Career Development, Dynamic Skills	<p>Administrator task:</p> <ul style="list-style-type: none"> <li>• Define a job model profile for the employee's career of interest from <b>My Client Groups &gt; Profiles &gt; Model Profiles</b>.</li> <li>• Add skills to the Skills Center content section of the job model profile. At a minimum, mark one or more skills as Required.</li> </ul>
Popular for your careers of interest: Gigs	<p>Career Development, Opportunity Marketplace</p> <p>Optional: Dynamic Skills</p>	<ul style="list-style-type: none"> <li>• 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 in their Recommended gigs list. The posting date of the gig must be less than six months from the current date.</li> <li>• The skills defined in the Skill Center section of the job model profile of the career of interest must match the skills in the trending gig.</li> <li>• 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.</li> </ul>
Popular for your careers of interest: Jobs	Career Development, Opportunity Marketplace, Recruiting	<ul style="list-style-type: none"> <li>• 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 in their Recommended jobs list. The posting date of the job must be less than six months from the current date.</li> <li>• The skills defined in the Skill Center section of the job model profile of the career of interest must match the skills in the trending job.</li> <li>• 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.</li> </ul>
Popular for your careers of interest: Development journeys	Journeys	<ul style="list-style-type: none"> <li>• All global journeys of the Career Development category appear here.</li> </ul>
Popular for your careers of interest: Connections	<p>Connections, Learning</p> <p>Optional: Opportunity Marketplace</p>	<ul style="list-style-type: none"> <li>• 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.</li> </ul>

### Related Topics

- [Create a Gig Using Opportunity Marketplace](#)
- [Create a Job Using Opportunity Marketplace](#)
- [Suggested Skills to Set as Learning Outcomes](#)

## View Your Career Interests and Objectives

On the side panel of the Grow page, you can see a consolidated view of interests and objectives that you chose or were chosen for you in other parts of HCM.

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

- Your career progression path.
- Skills you already have or are interested in developing. The skills that you chose recently from Skills Center appear first.
- Learning communities that you're following - the most recently followed communities appear first.
- Your careers of interest - the ones you chose most recently in Career Development appear first.
- 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.
- 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.
- Your favorite connections for your primary job assignment.

## Explore Career Path on Oracle Grow

Viewing your career progression path can help you to better plan for your career growth. You can identify the qualifications and skills needed for the careers in the career path.

You can view your career progression path on these pages:

- [Explore Careers](#)
- [Career details](#)

To see the career progression path, click the **Explore your career path** icon on your Oracle Grow page. Note that you can see only a single progression path for a career.

The career name shown on the career progression path depends on whether an active job model profile is associated with the job code of the career.

- If an active job model profile is associated with the job code, you can see the job model profile name. Click the job model profile name to view the career details.
- If no active job model profile is associated with the job code, you can see only the job display name.

## View Career Progression Path on Explore Careers Page

On the Explore Careers page, if your HR specialist has defined your career progression path, you can see the next 3 jobs in your progression hierarchy. You can see the career progression path only for your primary job assignment.

## View Career Progression Path on Careers Details Page

On the career details page, you can see the career progression path for that career if it has been defined in the job details of that career. The career progression path lists the next 3 jobs in the progression hierarchy of the career.

Viewing the career progression path can help you to decide whether you should add that career to your careers of interest.

### Related Topics

- [Model Profile Types](#)

# Tools to Excel in Your Current Role

## 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 you increase competency, add certifications, and so on.

You can also view learning that's relevant to the gigs you've identified as your favorites, learning that's popular in your peer group, and featured or recently added learning to the learning topics that you follow. 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 access items that are relevant for your role from the popular suggestions. You can navigate to the respective product pages from the Grow page and take action on popular items.

## Resources and Actions for Your Current Role

In the **Excel in Your Current Role** tab, you can see the following actions and suggestions to close skill gaps and excel in your role.

- **Tasks to finish** – These are 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.
- **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.



- **Suggested learning for you** – Learning that can help fill any skills and qualifications gaps for your role. This list includes learning that will help you fill competency, skill, language, certification, membership, education, and honors gaps.
- **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.
- **Recommended development journeys** – Journeys that are the most commonly allocated or assigned, so you can decide which journeys to assign to yourself.
- **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.
- **Suggested learning for your skills** – These could be core skills marked as required by your manager or skills defined for your role, or both. You'll see featured learning first. All learning items are sorted based on ratings. In the absence of ratings, they're sorted in alphabetical order.
- **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.
- **Popular learning among 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 recommended 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.
  - Development journeys which are the most commonly allocated or assigned, ranked by number of assignments.
  - 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.

## Tools to Grow Your Career

### How Grow Helps with Your Career Growth

In the **Grow Your Career** tab, you can view learning recommendations for your careers of interest and develop the skills you want to acquire.

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.

## Resources and Actions for Your Career Growth

In the Grow Your Career tab, you can see the following actions and suggestions to help you work toward your career growth:

- **Suggested learning for your careers of interest** – These learning recommendations help qualify for your careers of interest by helping you fill gaps in your skills and qualifications. They're displayed in the order of learning that can help cover the most gaps.
- **Suggested learning for your skills** – These include skills that aren't marked as required by your manager or for your current role.
- **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 related to 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 recommended 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.
  - Global development journeys which are the most commonly allocated or assigned appear here. They're ranked based on the number of assignments.
  - 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 Recommended development journeys might appear in this feed if the administrator has turned them on. They will show the same items as those for your current role.

# 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 can granularly target communications to their employees, as well as retarget future communications based on employee engagement. Communication teams can also 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.

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	<ul style="list-style-type: none"> <li>• ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB</li> <li>• ORA_HRC_HUMAN_CAPITAL_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB</li> </ul>	<p>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:</p> <ul style="list-style-type: none"> <li>• <i>Enable HCM Communicate</i></li> <li>• <i>Assign the Campaign Administrator Role</i></li> </ul>

User Type	Roles or Privileges Required	User Capabilities
		<ul style="list-style-type: none"> <li>Assign the Campaign Manager Role</li> </ul>
Campaign Administrator	<ul style="list-style-type: none"> <li>ORA_IRC_EMPLOYEE_CAMPAIGN_ADMINISTRATOR_JOB</li> <li>ORA_HRC_HUMAN_CAPITAL_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB</li> <li>ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB</li> </ul>	<p>If you're assigned a Campaign Administrator role, refer to the HCM Communicate for Campaign Administrators chapter. Here are the tasks you can perform:</p> <ul style="list-style-type: none"> <li>Create an Email Template</li> <li>Create a Predefined Link</li> <li>Create an Email Sender Profile</li> <li>Create a Predefined Audience</li> <li>Create a Communication Team</li> </ul>
Campaign Manager	<ul style="list-style-type: none"> <li>ORA_IRC_EMPLOYEE_CAMPAIGN_MANAGER_JOB</li> <li>ORA_BEN_REST_SERVICE_ACCESS_ELIGIBILITY_OBJECT_RESULTS_FOR_BEN</li> <li>Use REST Service - Benefits Lists of Values</li> <li>Use REST Service - Eligibility Objects</li> </ul> <p>For journey related campaigns you need these:</p> <ul style="list-style-type: none"> <li>PER_VIEW_GLOBAL_JOURNEYS_PRIV - functional privilege to view journeys</li> <li>Explore option enabled in the Checklist template in the Security tab</li> </ul>	<p>If you're assigned a Campaign Manager role, refer to the HCM Communicate for Campaign Managers chapter. Here are the tasks you can perform:</p> <ul style="list-style-type: none"> <li>Create a General Communication Campaign</li> <li>Create a Get Response Communication Campaign</li> <li>Create a Promote Journey Communication Campaign</li> <li>Select the Audience of a Communication Campaign</li> <li>Create an Email for a Communication Campaign</li> <li>Create a Follow-Up Email for a Communication Campaign</li> <li>Schedule a Communication Email</li> <li>Activate a Communication Campaign</li> </ul>

## 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

# 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.
  - o ORA\_IRC\_EMPLOYEE\_CAMPAIGN\_ADMINISTRATOR\_JOB
  - o ORA\_HRC\_HUMAN\_CAPITAL\_MANAGEMENT\_APPLICATION\_ADMINISTRATOR\_JOB
  - o 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:
  - o Use REST Service - Benefits Lists of Values
  - o 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.
  - o ORA\_IRC\_EMPLOYEE\_CAMPAIGN\_MANAGER\_JOB
  - o 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](#)

## HCM Communicate for Campaign Administrators

### HCM Communicate Setup and Maintenance Tasks

The table lists the setup tasks of the HCM 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.	<a href="#">Create an Email Template</a>
Manage Predefined Links	Task to create predefined links that are available to campaign managers when they create emails for a communication campaign.	<a href="#">Create a Predefined Link</a>
Manage Email Profiles	Task to create email sender profiles that are available to campaign managers when they create emails for communication campaigns.	<a href="#">Create an Email Sender Profile</a>

Task Name	Description	Recommended Help
Manage Predefined Audience Criteria	Task to use eligibility profiles to create predefined audiences for employee communication campaigns.	<i>Create a Predefined Audience</i>
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.	<i>Create a Communication Team</i>
Manage Communicate Media	Task to upload and store images to create a media library. Campaign managers can access these images when creating email communications.	<i>Upload an Image to the Media Library</i>

## 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: HCM 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:
  - o Sender Profile Name: Name of the profile which displays to the campaign administrator and campaign manager. The name must be unique.
  - o From Display Name: Name which displays to campaign email recipients indicating who the email is from.
  - o From Email Address: Email address which displays to campaign email recipients.
  - o Reply to Display Name: Name which displays to campaign email recipients indicating to whom to reply to the email.
  - o 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

You can use eligibility profiles 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.

### 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:
  - o Name: Enter a name for the eligibility profile.
  - o Profile Type: This is prefilled as Participant.
  - o Profile Usage: Determines the type of objects the profile can be associated with. Select Employee Communication or Global. Selecting Global makes the profile available to multiple business process usages.
  - o Description: Enter a description for the eligibility profile.
  - o Assignment to Use: This is prefilled as Specific assignment. This will take into consideration all employees who are permanent, on contract, or both.
  - o 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 subcriteria. Define the sequence, name, whether the criteria should be excluded from eligibility, and the criteria start date and end date.

5. Click **Save and Close**.

### What to do next

You can use predefined audiences when creating a communication team.

#### Related Topics

- [Eligibility Profiles](#)

## 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.

### 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.
  - o General: Select this option for general communications where a response isn't required. For example, a list of holidays.
  - o 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.
  - o 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.
  - o Select All if you want the communication team to create General, Get Responses, and Promote Journey 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. Click **Save and Close**.
9. On the Manage Communications Team page, select the Activate option for the team.

## 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 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 amount of characters that employees can receive as an SMS. If the campaign manager exceeds the character limit, then the application won't send any characters exceeding the limit.
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. Contact Twilio 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 only one active messaging provider.

## 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.

# 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](#)

## 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**.

## 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 that can be used by a particular communication team. As a campaign manager, you can then use these predefined audiences to target a segment of employees for your communication campaign. You can only select audiences set for the communication team.

### 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.
  - o 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.
  - o 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**.
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** 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 Eligibility 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](#)

## 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:
  - o From Display Name
  - o From Email Address
  - o Reply to Display Name
  - o 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:
  - o SMS Name: displays to the campaign manager on the Content tab.
  - o 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.
  - o Link Options: insert a link or token directly into the message.
  - o 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](#)

## Scheduled Processes

### Scheduled Processes for HCM Communicate

When you are working in a test environment, run scheduled processes manually to ensure that emails are sent out.

Scheduled Process	Description	When to Run	Who Runs It	Recommended Frequency
Import User and Role Application Security Data	Import user and role data from LDAP and store it in the Applications Security table. It also updates role and privilege changes for users.	After the Campaign Administrator and Campaign Manager roles have been created and assigned to users within the organization.	Campaign Administrator	Every 24 hours
Evaluate Eligibility	Evaluate the eligibility and displays the audience breakdown.	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	Populates the campaign audience list and the campaign email's subject, body text, and tokens for each recipient.	After a campaign is activated.	Campaign Manager	Every 30 minutes
Send Campaign Email	Sends the campaign email to the campaign audience.	After a campaign is activated, and after successfully running the Prepare Campaign Email process.	Campaign Manager	Every 30 minutes
Track Campaign Email Delivery	Tracks the delivery status of campaign emails.	After an email was sent out.	Campaign Manager	Every 30 minutes

*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, bulleted 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 dropdown 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](#)



# 6 Touchpoints

## Overview of Touchpoints

### Introduction to Touchpoints

Oracle Fusion Cloud Touchpoints enables managers and employees to have informed and meaningful interactions that build trust, boost engagement levels, and improve productivity.

It encourages managers to take necessary steps to improve engagement levels and build trust with their team. It also supports employees with tools to voice their opinions and proactively enhance their work interactions.

As a manager, you can:

- Encourage employees to share their needs and thoughts through regular quick pulse surveys.
- View real-time insights into your team's pulse trends and see how they compare with the rest of the organization.
- View pulse trends of multiple surveys that are assigned to your team.
- Initiate conversations with employees and proactively engage with them through different interaction channels.
- View all past and upcoming events and interactions with your direct reports on a single, consolidated page.
- Set up a regular check-in cadence with custom or recommended discussion topics.
- Recognize employees by highlighting important moments, such as birthdays and work anniversaries
- Provide timely feedback on their work performance and also request feedback from others.

As an employee, you can:

- Voice your opinions and share concerns in a timely manner.
- View your engagement activity, including pulse trends, interactions, and completed surveys.
- 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 check-in meetings with your manager and add custom or recommended discussion topics.
- Send feedback or celebration cards to your manager and colleagues to appreciate their work or celebrate their personal milestones.
- Request feedback from your manager and others in the organization.

**Note:** Oracle Touchpoints is a separately sold product.

## Overview of Touchpoints Features

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

## Events and Interactions

Touchpoints enables managers and their team members 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 celebratory cards. Celebratory cards are sent for personal milestones or achievements such as birthdays or work anniversaries.

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

## Engagement Metrics

Touchpoints provides 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 as well as in the rest of the organization.

They can view these metrics both for their direct reports and for any manager who reports to them:

Metric	Description
Team - Average Interactions	<p>This is the average number of interactions between a manager and their direct reports in the past 90 days.</p> <p>This analytic is calculated as the total number of interactions divided by the total number of direct reports who've had at least one feedback or check-in interaction in the last 90 days. The total number of interactions includes all celebration cards and anytime feedback that direct reports have received, any feedback that an employee or manager has requested, and the total number of Touchpoints check-ins that have been held with them in the last 90 days.</p>
Organization – Average Interactions	<p>This is the average number of interactions between all managers and their direct reports in the entire organization over the past 90 days.</p> <p>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 feedback or check-in interaction in the last 90 days. The total number of interactions includes all celebration cards and anytime feedback that all employees have received, any feedback that employees or managers have requested, and the total number of Touchpoints check-ins that have been held with them in the last 90 days.</p>
Team – Average Check-ins	<p>This is the average number of Touchpoints check-ins that have been scheduled with a manager's direct reports over the past 90 days.</p> <p>This analytic is calculated as the total number of check-ins scheduled with direct reports in the last 90 days divided by the total number of direct reports who've had at least one check-in the last 90 days.</p>
Organization – Average Check-ins	<p>This is the average number of check-ins between all managers and their direct reports in the entire organization over the past 90 days.</p> <p>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.</p>
Pulse score comparison chart	<p>This chart enables you to analyze pulse trends over a period of time for three groups of employees: direct reports, indirect reports, and all employees in the organization.</p> <p>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.</p>

Metric	Description
	<p>It displays the pulse score averages over a period of time, which depends on the survey frequency specified while configuring the survey:</p> <ul style="list-style-type: none"> <li>• If the survey frequency is daily, the scores are displayed for a period of 7 days</li> <li>• If the survey frequency is weekly, the scores are displayed for a period of 6 weeks</li> <li>• If the survey frequency is monthly, the scores are displayed for a period of 6 months</li> <li>• If the survey frequency is quarterly, the the scores are displayed for a period of 6 months</li> <li>• If the survey frequency is yearly, the scores are displayed for a period of 6 years</li> </ul>
Employee pulse scores	<p>These are individual pulse scores for a manager's direct reports, which are computed based on the pulse survey completed by each employee. The lowest pulse scores are displayed first in this section.</p> <p>The pulse score is defined and calculated through the scoring option set on the survey questionnaire. The threshold value for determining low scores is configured in the survey definition using the Checklist Templates task.</p>
Number of check-ins completed per month	These are check-in meetings held between a manager and their direct reports, with all topics marked as completed in the current month.
Number of check-ins not completed per month	These are check-in meetings held between a manager and their direct reports, with some topics marked as not completed in the current month.

**Note:**

- These metrics aren't available for a matrix manager.
- 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 are displayed as recommended actions on the employee Touchpoints page, as recommended insights topics on check-in pages, and through email notifications. They are 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 delivered in this release include the following:

Nudge Reason	Purpose
Employee's anniversary is approaching	Encourages the manager to celebrate an employee's work anniversary
Employee's birthday is approaching	Encourages the manager to celebrate 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

Nudge Reason	Purpose
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 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 keep track of the employee's progress on high priority performance goals
Employee completes performance goals ahead of the target completion date	Encourages the manager to celebrate an employee's accomplishment when they complete performance goals ahead of the target schedule
Employee has a low pulse score	Encourages the manager to keep track of 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**.

## 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

The Administrator needs to have the `ORA_PER_NUDGE_CONFIGURATION_DUTY` duty role to configure nudges.

*Related Topics*

- [Role-Based Security](#)
- [Role Types](#)

## Profile Options for Touchpoints

To use Touchpoints, enable the following profile options:

Profile Option Code	Profile Option Name
ORA_HRE_ENABLE_TOUCHPOINTS	Enable Oracle Touchpoints
HCM_RESPONSIVE_PAGES_ENABLED	Mobile-Responsive HCM Pages Enabled

To enable these options:

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 check-ins in Touchpoints, you need to configure a Touchpoints check-in template in Performance Management and set it to active.

Some points to consider while configuring the Touchpoints 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.

*Related Topics*

- [Create a Check-In Template](#)

### Configure the Touchpoints Questionnaire and Pulse Survey

Touchpoints pulse surveys are created using Questionnaires, configured using the Checklist Templates task, and assigned to your team using the Journeys application.

When employees respond to surveys, they can view their pulse score trends in Touchpoints. Their managers can also view them.

## Create the Pulse Survey Questionnaire

A few points about creating pulse surveys:

- Before creating a questionnaire, you need to select the subscriber as Touchpoints and create a questionnaire template.
- 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.
- When creating a pulse survey questionnaire or question, always ensure that you select the scoring option. 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.

To create a pulse survey questionnaire, follow these steps:

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 will 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 create a new one.
3. If you want to create a new questionnaire, search for the questionnaire template, **Touchpoints Pulse Survey Template**, and create it based on this template.
4. On the Create Questionnaire page or Edit Questionnaire page, specify the details as required in the respective fields. A few points to note:
  - It's recommended that you select the overall score calculation rule as **Sum**.
  - Set the status of the questionnaire to **Active**.
  - The **Score Questionnaire** check box is selected by default, because this is based on the Touchpoints template. Leave this check box selected.
  - 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.
5. Click **Next**.
6. In the Questions section, you will see a default question that's available as part of the template. You can edit this question and create additional questions that you need. Ensure that each question that you create is scored.
7. After you've added the questions that you need, click **Next**.
8. 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 VBCS. 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.

9. Click **Save and Close**.

### Configure the Pulse Survey

After creating the pulse survey questionnaire, configure it using the **Checklist Templates** task in Setup and Maintenance. While configuring, specify these key values:

- **Analysis Period** – This determines the period for which pulse scores are calculated and displayed as graphs in Touchpoints. For example, if you specify 4 weeks as the analysis period, pulse scores are calculated and displayed for a four-week period in the **Pulse score comparison chart** on the employee's Touchpoints page.
- **Threshold Score** – Pulse scores that fall below the threshold value are considered as low scores.

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

Let's say you want to send out a daily pulse survey to the direct reports of a manager, Jennifer Smith. The survey starts from 1/15/2023. This example shows how to configure the survey using the **Checklist Templates** task and a sample questionnaire called Daily Pulse Survey Questionnaire.

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	Value
Name	Daily Pulse Survey
Status	Active
Country	All Countries
Category	Survey
Survey Subtype	Touchpoints
Archive After Months	Use the default value, or change as required.
Purge After Months	Use the default value, or change as required.

4. On the **General** tab, specify the start date of the survey as 1/15/2023. The end date is optional.
5. On the **Tasks** tab, click the **Create Task** icon, and complete the fields as shown in this table.

Field	Value
Name	Daily Pulse Survey
Status	Active
Description	Optional
Task Type	The default is Survey. Leave as is.

Field	Value
Questionnaire	Daily Pulse Survey Questionnaire

- Click **Save and Close**.
- On the **Message** tab, you can enter optional details as shown in this table.

Field	Value
Title	Pulse Survey
Subtitle	Take a few moments to share your thoughts with us.
Completion Message	Thanks for sharing how you felt today.

- Click **Save**.
- Click the **Schedule Allocation** tab. In the Scheduled Allocation section, complete the fields as shown in this table.

Field	Value
Start On	Defaults to 01/15/23. Leave as is.
Repeat	Day
End Recurrence	Specific date
End Date	12/31/23
Number of Runs Per Period	Every day of the period

**Note:** If you want to extend the survey for a longer period in the same recurrence frequency, you can edit this checklist template task and change the end date. If you want to change the recurrence frequency from daily to weekly, then it's recommended that you create a new checklist template task.

- In the Reporting Attributes section, enter these values:

Field	Value
Analysis Period	2 weeks
Threshold Score	3

- Click **Generate** to generate the survey.
- Click **Save and Close**.

## Assign the Pulse Survey

After configuring the pulse survey, the next step is to assign it to the target audience using the Journeys application.



This example uses the daily pulse survey generated in the previous example and shows how to assign it to Jennifer Smith's direct reports.

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. Enter these values on the Assign Journey page.

Field	Value
When to assign journey?	01/15/23
Repeat	As per schedule
Comments	Daily pulse survey assigned to Jennifer Smith's reports.
Selection Type	Direct Reports
Select a Person	Jennifer Smith's directs

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.

Employees can access the survey from their My Journeys page in the Journeys application and respond to it.

#### Related Topics

- <https://www.oracle.com/pls/topic/lookup?ctx=fa23d&id=u30236785>
- [How You Create a Questionnaire](#)

## 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 when the criteria defined in the nudge configuration matches, falls below, or exceeds a specific value configured by the Administrator.

**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	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	Check-in between a manager and	The nudge appears when a check-in	Manager	Touchpoints card, email	Weekly or monthly

Module	Scenario	Criteria	Recipient	Nudge Channel	Recommended Run Frequency
	employee hasn't been scheduled for a period of time	hasn't been scheduled for a specific number of days. The Administrator configures the number of days.			
Check-in	Check-in between manager and employee is approaching	The nudge appears a specific number of days before the scheduled check-in date.  The Administrator configures the number of days.	Manager, Employee	Email	Weekly or monthly
Feedback	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.  The Administrator configures the number of days.	Manager	Touchpoints card, check-in insights, email	Bi-monthly or monthly
Feedback	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.  The Administrator configures the number of days.	Employee	Touchpoints card, email	Bi-monthly or monthly
Feedback	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.  The Administrator configures the number of days.	Employee, Manager	Touchpoints card, email	Bi-monthly or monthly
Goal Management	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	Manager	Touchpoints card, check-in insights, email	Monthly

Module	Scenario	Criteria	Recipient	Nudge Channel	Recommended Run Frequency
		<p>target completion date.</p> <p>The Administrator configures the number of days.</p>			
Goal Management	Employee has performance goals that are due soon but goal completion percentage is less than a defined percentage	<p>The nudge appears when a specific number of days remain before the target completion date, and the goal completion percentage is less than a specific target percentage.</p> <p>The Administrator configures the number of days and target percentage.</p>	Employee	Touchpoints card, check-in insights, email	Monthly
Goal Management	Employee has performance goals with a past goal start date and a status of Not Started	<p>The nudge appears when the goal remains in the Not Started status even after a specific number of days have passed since the goal start date.</p> <p>The Administrator configures the number of days.</p>	Manager	Touchpoints card, check-in insights, email	Monthly
Goal Management	Employee has high priority aligned performance goals that are due soon	<p>The nudge appears when there are a specific number of days remaining before the target completion date.</p> <p>The Administrator configures the number of days.</p>	Manager	Touchpoints card, check-in insights, email	Monthly
Goal Management	Employee completes performance goals ahead of the target completion date	<p>The nudge appears when an employee completes goals a specific number of days ahead of the target completion date.</p> <p>The Administrator configures the number of days.</p>	Manager	Touchpoints card, check-in insights, email	Monthly

Module	Scenario	Criteria	Recipient	Nudge Channel	Recommended Run Frequency
Goal Management	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.  The Administrator configures the number of days.	Employee	Touchpoints card, check-in insights, email	Monthly
Goal Management	Employee doesn't have performance goals in the goal plan	The nudge appears when performance goals aren't added to the goal plan for a specific number of days since the start of the current review period.  The Administrator configures the number of days.	Employee, Manager	Touchpoints card, check-in insights, email, journeys	Monthly
Human Resources	Employee's anniversary is approaching	The nudge appears a specific number of days before the employee's anniversary occurs.  The Administrator configures the number of days.	Manager	Touchpoints card, email	Daily
Human Resources	Employee's birthday is approaching	The nudge appears a specific number of days before the employee's birthday occurs.  The Administrator configures the number of days.	Manager	Touchpoints card, email	Daily
Talent Profile	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.  The Administrator configures the number of days.	Employee	Touchpoints card, check-in insights, email, journeys	Quarterly

Module	Scenario	Criteria	Recipient	Nudge Channel	Recommended Run Frequency
Touchpoints Survey	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	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.  The Administrator configures the number of times.	Worker	Touchpoints card, email	Depends on the survey frequency
			Manager	Touchpoints card, check-in insights, email	

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** check box.
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	<p>Aggregates these engagement metrics that are displayed on a manager’s Touchpoints Summary page:</p> <ul style="list-style-type: none"> <li>• Team and organization average interactions</li> <li>• Team and organization average check-ins</li> <li>• Pulse score comparison chart containing averages for direct reports, indirect reports (if applicable), and the organization</li> <li>• Number of check-ins completed and not completed in the current month</li> </ul>	<p>Choosing a scheduling frequency is important because this determines how current the metrics are.</p> <p>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 July survey is completed. Then, you can see the averages from February to July in August.</p> <p>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.</p> <p>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.</p>

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 the 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 celebration card	Employee	HRE_Celebrations
Received thank you note for sending anytime feedback	Employee/Manager	HRT_ANYTIME_FEEDBACK_PROVIDED
Received thank you note for sending celebration card	Employee/Manager	HRE_Celebrations
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
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

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 HRC\_ACCESS\_ALERTS\_COMPOSER\_PRIV privilege 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](#)

## Other Configuration Considerations

You can modify some aspects of the Oracle Touchpoints user interface.

Touchpoints is built using a new tool called 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 score graph on the Employees page.

## 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.



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

### Understand Your Team Better

Using the Touchpoints Summary page, you can view and analyze pulse trends over time for your direct reports, indirect reports, and your organization.

To view this page, open Touchpoints by navigating to **My Team > Quick Actions > Show More > Touchpoints**.

You can compare the metrics on this page to 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.



You can also view:

- Engagement analytics for your team and the rest of the organization
- Individual employee pulse scores that need immediate attention
- Check-ins that are upcoming as well as overdue
- Status of check-ins for the current month

**Note:** Check-ins and other interaction analytics are displayed on this page only when check-ins are scheduled and completed, or feedback or celebratory messages are sent or received for your team members.

To view pulse trends for any team within your span of control, use the **Switch Team** button and select a manager's name.

If there are multiple surveys assigned to your team, you can analyze pulse trends for a specific survey. To do this, use the survey switcher on the top of the page.

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

- The engagement analytics on the Summary page change according to the selected manager and their direct team.
- The pulse score comparison graph for indirect reports appears only if the selected manager has indirect teams reporting to them.
- The pulse score comparison graph displays pulse score averages for the survey selected in the survey switcher. To be able to view the scores, the selected survey must be assigned to your team.
- The period for which pulse score averages are displayed depends on the survey frequency configured in the survey:
  - If the survey frequency is daily, the scores are displayed for a period of 7 days
  - If the survey frequency is weekly, the scores are displayed for a period of 6 weeks
  - If the survey frequency is monthly, the scores are displayed for a period of 6 months
  - If the survey frequency is quarterly, the the scores are displayed for a period of 6 months
  - If the survey frequency is yearly, the scores are displayed for a period of 6 years
- The **Schedule check-in** link in the Overdue check-ins section doesn't appear for indirect managers, since they can schedule check-ins only with their direct reports.
- A check-in is considered complete only if all discussion topics included in the check-in are marked as completed.
- The Team pulse scores section displays the lowest pulse scores first.

## View Your Team Interactions

To view the latest pulse scores and upcoming check-in dates of all the employees on your team, go to **My Team > Touchpoints**. Next, click the **Employees** tab.

The list of employees that appears on this Employees page pertains to the manager who's currently selected on the Summary page. For each employee, the latest pulse score from the survey selected on the Summary page are displayed. A 7-day trend line is also displayed next to the score. The pulse score is defined and calculated through the scoring option set on the survey questionnaire.

You can use the **Switch Team** button on the Employees page to view the employee data for a different manager. However, if you select the **Summary** tab next, the data on the Summary page pertains to the manager already selected on that page. It doesn't pertain to the manager that you changed on the Employees page.

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.

## Interactions with Individual Employees

Selecting an employee's name on the Employees page takes you to the employee's Touchpoints page.

On this page, you can see the past and current pulse scores for the employee over a period of time, which depends on the configured survey frequency:

- If the survey frequency is daily, scores are displayed for the past 7 days.
- If the survey frequency is weekly, scores are displayed for the past 6 weeks.
- If the survey frequency is monthly, scores are displayed for the past 6 months.
- If the survey frequency is quarterly, scores are displayed for the past 6 months.
- If the survey frequency is yearly, scores are displayed for the past 6 years.

Here, all the past interactions and upcoming check-ins for the employee appear in a timeline view. Past interactions include check-in meetings scheduled between you and the employee, and anytime feedback, requested feedback, and celebration messages received from you and others. This timeline displays data for three months in the past and in the future. Here, you can also see performance check-ins that are scheduled using Performance Management.

Another key feature of this page is the **Recommendations for you** panel that lists recommended actions that encourage interactions with the employee 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 the employee
- Celebrate the employee's personal milestones and achievements
- Provide feedback to the employee
- Prepare for an upcoming check-in
- Discuss performance goals that are at risk of delay with the employee
- Discuss pulse survey scores and survey response rates

When you add a performance goal-related discussion topic to a check-in, it's added to any existing check-in that's coming up within the next 7 days. If not, it's added to a new check-in.

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

## Promote Engagement through Interactions

### Schedule a One-Time Check-In

Regular check-ins help employees discuss concerns and share sentiments in a timely manner so that managers can address them effectively.

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

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 recommended topics. To view these recommendations, click the **View Recommended Topics** button.

Recommended topics are of three types:

- **Insights** topics, which encourage you to have discussions about interactions or goal-related scenarios applicable to you and the employee. 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 appear as recommended discussion topics.
- **Goals** topics, which include performance goals from goal plans that are active in the last 18 months and active development goals that you can add to the check-in for relevant discussions.
- **Feedback** topics, which include anytime feedback given to the employee that you can add to the check-in for relevant discussions.

After you add these topics to the check-in, you can do the following:

- Add notes to the topics
- Delete the topics
- Mark completed topics as discussed

Any note that you add to a discussion topic is retained only in that check-in. If you add the same discussion topic to a new check-in, you can add a new note on that topic.

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 interaction** 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't create or modify a check-in if you're not the direct manager of the employee.
- You can schedule only one check-in per day with your direct report.

## Modifying 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.

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

- View the details for goal and feedback-related discussion topics.
- Add or edit discussion topics.

- Add notes or edit the ones that you added.
- Mark discussion topics as complete.
- 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.
- Change a one-time check-in to a recurring check-in.

**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 insights 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.

While modifying a Performance check-in, you can add or edit discussion topics and notes.

*Related Topics*

- [Schedule a Recurring Check-In](#)

## Send Feedback

Sending timely feedback on an employee's work performance improves overall productivity.

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](#)

## Celebrate Events

Recognize employee milestones and achievements by sending celebration cards for occasions such as birthdays, work anniversaries, or even early goal completion.

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

While celebrating an event, you can choose from a selection of card templates to match the occasion. You can also set the card visibility to one of these options:

- Managers and worker (this will make the card visible to indirect managers as well)
- Only worker and me

As a manager, you can also send a thank you note to anyone who sent a celebratory message to a team member.

**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.

# 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.



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

## Understand Your Engagement

On your Touchpoints page, you can review your current and past pulse scores for pulse surveys that you've taken.

To view this page, go to **Me > Touchpoints**.

The pulse scores on this page are displayed over a period that matches the analysis period configured in the survey definition. 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.

From here, you can view a timeline of events and interactions with your manager and others in the organization. This includes past and upcoming check-ins, feedback that you've received and that's shared with you, and celebration cards that you've received. You can also see performance check-ins that are scheduled using Performance Management.

**Note:** You can't view feedback or celebrations you've given to others in your timeline.

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 celebratory messages to colleagues or managers

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.

## Manage Your Check-Ins

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 as well.

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 recommended topics, click the **View Recommended Topics** button in the check-in. These topics are personalized suggestions related to the following and are displayed in the corresponding tabs:

- **Insights** – Relevant interaction topics that are recommended based on configured nudges
- **Goals** – Performance goals in goal plans that are active in the last 18 months and any active development goals
- **Feedback** – Anytime feedback that you've received from your manager or others in the organization and made visible to you.

These topics are recommended to encourage you to keep your performance goals up-to-date and share job-related concerns with your manager.

When you complete discussing a specific topic during your check-in, you can mark it as discussed.

**Note:** You can schedule only one check-in per day with your manager.

## Modifying 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.

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 the details for goal and feedback-related discussion topics.
- Add or edit discussion topics.
- Add notes or edit the ones that you added.
- Mark discussion topics as complete.
- 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.
- Change a one-time check-in to a recurring check-in.

### Note:

- You can add insights 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.

While modifying a Performance check-in, you can add or edit discussion topics and notes.

### Related Topics

- [Schedule a Recurring Check-In](#)

## Send Feedback and Appreciation

You can send feedback or celebration cards to managers and colleagues 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.

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

While celebrating an event, you can choose from a selection of card templates to match the occasion. You can also set the card visibility to one of these:

- Managers and worker (this will make the card visible to indirect managers as well)
- Only worker and me

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

To send a thank you note, double-click a feedback or celebration card 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

- [Anytime Feedback](#)

## Other Manager and Employee Tasks

### 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. The manager and employee receive a notification when a recurring check-in 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 check-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.

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, 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.
- 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 that check-in, it's not carried over to the remaining check-ins.
- You can add your own discussion topics as well as goals, feedback, or Insights topics from the **Recommended topics** panel.

## 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.