Oracle Fusion Cloud Human Resources

Administering and Using Oracle Me Applications

24D

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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 ⑦ 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*.

Thanks for helping us improve our user assistance!

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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.

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2 Celebrate

Introduction to Oracle Celebrate

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

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

How You Configure Oracle Celebrate

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

Related Topics
- Configure Global Settings
- Create Programs

User Roles and Privileges for Oracle Celebrate

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

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

Configure Global Settings

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

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

You can configure these key aspects:

Reward Points

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

Redeem Points

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

Core Values

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

Program Images

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

Create Programs

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

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

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

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

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

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

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

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

Send Recognition to a Person

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

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

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

Send Awards to a Person

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

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

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

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

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Convert Reward Points to Cash

Here's how employees convert their points to cash:

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

Generate Element Entries for Cash Awards

You pay cash awards using payroll element entries.

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

Here's how generate element entries through the process:

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

Understand How Your Teams Use Oracle Celebrate

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

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

- Overview
- Employees
- Awards

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Oracle Celebrate Dashboard Pages

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

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3 Connections

Overview of Connections

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

With Connections, you can:

- Search and find coworkers quickly. Browse and filter search results easily using Oracle Search.

- View a coworker's profile for information like work location and time zone to schedule meetings.

- Add information about yourself in your profile for your coworkers to know and collaborate better with you.

- Use Favorites to mark people that you interact with often, or to build a network of people to help achieve your career objectives.

- See people's assignments, interests, and expertise to discover what you have in common with them. If a person has multiple assignments, you'll see multiple search results and view the assignment details in their profile.

- View a coworker's organization chart to understand their role and how they relate within their organization structure.

- Provide feedback to your coworkers and view feedback given to them by others depending on your role.

Configure Connections

Set Up Connections

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

- Enable the Workforce Deployment offering to view the profile options for Connections. For more information, see *Overview of Global Human Resources*.

- Review your existing profile option settings and check if any of them might impact the Connections search. For more information, see *Profile Options Considerations for Connections Search*.

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

Profile Options for Connections

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

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

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

Configure Oracle Search

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

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

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

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

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

Profile Options Considerations for Connections Search

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

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

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

Roles Required for Connections

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

- HCM Connections REST Services privilege

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

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

    - ORA_PER_CONTINGENT_WORKER_ABSTRACT
    - ORA_PER_EMPLOYEE_ABSTRACT

- Manage Scheduled Job Definition privilege, FND_MANAGE_SCHEDULED_JOB_DEFINITION_PRIV

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

  - ORA_FND_APPLICATION_ADMINISTRATOR_JOB
  - ORA_FND_APPLICATION_DEVELOPER_JOB

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

Use Connections

Search for People in Connections

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

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

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

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

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

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

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

What's a Connections Profile

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

- Header: Header contains your name, contact information, business title, work location, work phone number, your Slack and Zoom details. You can add a display picture and links to your social media profiles like LinkedIn, Twitter, and Facebook. You can use the use the icon next to the phone numbers and email addresses to copy and then paste them elsewhere easily.

- Organization: Organization displays your reporting hierarchy, your reports if you have any, number of reports, job, department, business unit, and Areas of Responsibility representatives.

- About Me: You can describe yourself and your work here. You can add your areas of interest, expertise, and work experience. You can also add tags that indicate your work, interests, expertise, and anything that represents you. Your colleagues can use tags to search for people in Connections. You can also use artificial intelligence to generate content about yourself using keywords that describe your job and any other details.

- Favorites: If you're using Oracle Grow, you can mark connections as favorites from their profiles to create a network of people. On the Oracle Grow page, you'll see them all in the Connections region. You can also find others who are considered Popular in your role. You need to have the Access Career Growth by Worker privilege added to your role to add favorite connections.

- Skills and Development: You can see this panel on your profile if you've purchased and implemented Dynamic Skills. For more information, see the Dynamic Skills documentation.

- Experience: This section contains your tenure with the company and your enterprise service history.

- Links: You can add links of your interest in this section.

- What Others Think: You can view the feedback you've received, thank the person that sent you feedback, and provide feedback for your colleagues. The person who sent you feedback can select who can view their feedback to you.

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

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Related Topics

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

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4 Grow

Overview of Oracle Grow

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

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

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

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

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

You can access your Grow page using:

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

Implement Grow

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:

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- o 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*.
      - o Career Development: Oracle Grow provides a comprehensive view of an employee's career information. For details, see *Implementing Career Development*.
      - o Profile Management: Oracle Grow takes input about an employee's skills, competencies, and accomplishments from their talent profile. For details, see *Profile Management*.
- Optional:
      - o 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 *Journey Categories*.
      - o Opportunity Marketplace: Oracle Grow suggests learning recommendations for the jobs and gigs that you're interested in. For details, see *What is Opportunity Marketplace*.
      - o Oracle Recruiting Cloud: Opportunity Marketplace is available in Oracle Recruiting Cloud. For details, see *Implementing Recruiting*.
      - o 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 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 on the Grow page and learn more about the skills, competencies and work requirements needed for the role. You can also view your career progression path and learn more about the career roles in that path.

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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. Using the skill detail page, you can choose to add them to the skills you're proficient in, or add them to the list of skills you want to develop.

- 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.

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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	Index Name to Reingest Parameter
ESS job to create index definition and perform initial ingest to OSCS	- fa-hcm-workerjourney - fa-hcm-workerjourneytask
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	Index Name to Reingest Parameter
ESS job to create index definition and perform initial ingest to OSCS	fa-hcm-modelprofile
Process Career Roles for Oracle Search Ingestion	Not applicable

Note: To enable the career role listing and detail pages for employees, grant the employee role the functional security privilege, Manage Career (HRG_MANAGE_CAREER_DETAILS_PRIV). This is already added to the predefined employee role.

Learning

- Ensure that these profile options are enabled:
    - HRC_ELASTIC_SEARCH_ENABLED

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       o ORA_WLF_ORACLE_SEARCH_LEARNINGRECOMMENDATION_ENABLED

- Run this scheduled process as a one-time setup or when required:

Name of the Process	Index Name to Reingest 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	Index Name to Reingest 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	Index Name to Reingest 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 to display the required data in each of the panels in Grow:

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

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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
Know your role	Career Development	HR specialist task: • Define a job or position profile from **My Client Groups** > **Profiles** > **Job Profiles** or **Position Profiles**. • Add skills to the **Skill Center** content section of the job or position profile. At a minimum, mark one or more skills as Required. • Define an employee's career progression path using the **Manage Jobs** task in Setup and Maintenance. Note that you can create only one career progression path for a job role.
Skills	Dynamic Skills	Employee task: • Choose skills that you already have or are developing for your current role. Click the **Skills** link or go to **Me** > **Skills Center** to choose these skills.
Learning topics	Learning	Employee task: • Choose learning topic communities to follow. Click the **Learning topics** link, select the learning community you're interested in and click the **Follow** icon. When an employee follows a learning community, they become a member of the community. • Or, you can also join a topic community from Learning. Go to **Me** > **Learning**, click **Search** and select the Learning type as **Learning Community**. Select a learning community you're interested in, click **Learn More** and then click **Join**.
Careers of interest	Opportunity Marketplace, Career Development	Administrator task: To enable a career role to appear on the listing page in Opportunity Marketplace: • Define a position profile or job profile for a career role from **My Client Groups** > **Profiles** > **Job Profiles** or **Position Profiles** and associate it with the respective position or job. • Run the Process Career Roles for Oracle Search Ingestion scheduled process. To enable the **Jobs** tab on the career role details page: • Grant employees the functional security privilege, Access Internal Candidate Experience (IRC_ACCESS_INTERNAL_CANDIDATE_EXPERIENCE_PRIV). • Set the ORA_HCM_OPP_MARKET_PLACE_CAREER_ROLES profile option to **Y** at the site level. To enable learning items and career ambassadors to appear in the **Resources to help fill role gaps** section: • Grant the security privilege ORA_WLF_REST_SERVICE_ACCESS_LEARNING_CATALOG_LOV to the employee role.

Career Interests and Objectives	Product Requirements	Additional Setup Tasks
		• Set the ORA_HRD_CAREER_AMBASSADORS_ENABLED profile option to **Y** to enable the Career Ambassador feature. Employee task: • Choose careers of your interest. To do so, click the **Careers of interest** link from the side panel in Grow. On the listing page, find a career you're interested in. Click the career role card, and on the career details page, click **Add to Favorites**. • Employees in the same role as a career of interest must enroll themselves as career ambassadors in Connections.
Gigs	Opportunity Marketplace	Employee task: • Choose favorite gigs by clicking the **Gigs** link. Select a gig that you're interested in, and click **Add to Favorites** from the **Actions** menu. • Or, you can search for gigs in **Me > Opportunity Marketplace** (use the **Opportunity** filter on the **Explore** tab) and add them as favorites from the **Actions** menu. The posting date of these gigs must be less than six months from the current date.
Jobs	Opportunity Marketplace	Employee task: • Choose favorite jobs by clicking the **Jobs** link. Select a job that you're interested in, and click **Add to Favorites** from the **Actions** menu. • Or, you can search for jobs in **Me > Opportunity Marketplace** (use the **Opportunity** filter on the **Explore** tab) and add them as favorites from the **Actions** menu. The posting date of these jobs must be less than six months from the current date.
Connections	Connections	Administrator task: To enable the favorite feature in Connections: • Grant the Access Career Growth by Worker privilege (HRD_ACCESS_CAREER_GROWTH_BY_WORKER_PRIV) to the employee role. Employee task: • Add an employee as a favorite. Go to **Me > Connections**, search for the employee, and click the **Favorite** icon in their profile.

Note: These sections appear only if there's data to display and you have the required data security privilege and function security privilege in the products that generate this data.

Additional Set Up for Excel In Your Current Role Tab

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

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Excel in Your Current Role	Product Requirements	Additional Setup Tasks
Tasks to finish	Journeys	Manager or employee task: • You or your manager must create a journey of type Career Development and assign it to you using Journeys. All tasks in this journey category appear here. For details on how to create and assign journeys, see the Related Topics section.
Skills assigned by your manager	Learning	This swim lane appears when the ORA_WLF_ENABLE_GROW_RECOMMENDATIONS profile option is set to **Yes** and the data is set up using the Recommendation Profiles application. Administrator task: • Set up learning recommendations using the Recommendation Profiles application (available in **My Client Groups**). For more information, see the topic *Recommend Learning from the Recommendation Profiles Page*.
Resources to meet job requirements	Learning	This swim lane appears when the ORA_WLF_ENABLE_GROW_RECOMMENDATIONS profile option is set to **Yes** and the data is set up using the Recommendation Profiles application. Administrator task: • Set up learning recommendations using the Recommendation Profiles application (available in **My Client Groups**). For more information, see the topic *Recommend Learning from the Recommendation Profiles Page*.
Suggested learning for you	Learning	This swim lane will appear instead of the **Skills assigned by your manager** and **Resources to meet job requirements swim lanes** swim lanes if the ORA_WLF_ENABLE_GROW_ RECOMMENDATIONS profile option is set to **No**, and the data is set up using the steps mentioned below. Administrator task: Run the scheduled process, **Recommend the Most Popular Learning**, with the recommendation category: • Recommendations for current job gaps • Recommendations for your manager assigned skills If any learning items match the criteria specified in this process, those learning items appear here. Or, you can recommend any learning item manually to have it appear in this feed. To do so, follow these steps: 1. Go to **My Client Groups** > **Learning** and select a learning item, **Courses**, for example. 2. On the Courses page, select the course that you want to recommend. 3. Click **Learners** from the side panel, and then select **Recommendation** from the **Add Learners** menu. 4. Select the recommendation category as **Recommendations for current job gaps** or **Recommendations for your manager assigned skills**, and click **Next**. 5. Add the name of the employee, and click **Submit**. These steps trigger the **Process Learning Recommendations** job which creates the learning recommendation.
Your current learning	Learning	Employee task: • Enroll in a learning item. A learning item could be a course, specialization, video, or tutorial. For details on enrolling in a learning item, see the Related Topics section.

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Excel in Your Current Role	Product Requirements	Additional Setup Tasks
Your current development journeys	Journeys	Manager or employee task: • You or your manager must create a journey of type Career Development and assign it to you using Journeys. For details on how to create and assign journeys, see the Related Topics section.
New learning in topics you follow	Learning	Employee task: • Follow a learning community. Click the **Learning topics** link from the side panel in Grow, select the learning community you're interested in, and click the **Follow** icon. Administrator task: • Add featured learning items or new learning items to the learning community followed by the employee. To do so, go to **My Client Groups** > **Learning** > **Communities**. Search for a topic community, open it and click **Catalog** from the side panel. The learning items in this topic community appear. From the shortcut menu (identified by three dots) on the learning item, click **Add to Featured**.
Learning based on your favorite gigs	Learning, Opportunity Marketplace	Employee task: • Choose favorite gigs by clicking the **Gigs** link on the side panel in Grow. Select a gig that you're interested in, and click **Add to Favorites** from the **Actions** menu. Administrator task: • Add skills to the favorite gigs. These skills must match the skills marked as Required in the job profile for the employee's role. Note that even if you've defined a position profile for the employee's role, you need to also define a job profile for this swim lane to display data. • Ensure that one or more skills added to the favorite gigs are present in the Learning Outcomes section of a learning item. For details on these tasks, see the Related Topics section.
Learning popular with your coworkers	Learning	Administrator task: Run the process, **Recommend the Most Popular Learning**, with the recommendation category, Popular with managers and peers. It's recommended to select the **Recalculate recommendations** checkbox as it considers the learning items completed over the past six months to generate recommendations. If you don't select this checkbox, the process considers learning completions over the past week to generate the recommendations. It's recommended to run this process on a weekly basis. If any learning items match the criteria specified in this process, those learning items appear here. Or, you can recommend any learning item manually to have it appear in this feed. To do so, follow these steps: 1. Go to **My Client Groups** > **Learning** and select a learning item, **Courses**, for example. 2. On the Courses page, select the course that you want to recommend. 3. Click **Learners** from the side panel, and then select **Recommendation** from the **Add Learners** menu. 4. Select the recommendation category as **Popular with managers and peers**, and click **Next**. 5. Add the name of the employee, and click **Submit**.

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Excel in Your Current Role	Product Requirements	Additional Setup Tasks
		These steps trigger the **Process Learning Recommendations** job which creates the learning recommendation.
Popular in your role > List of learning items	Learning	Administrator task: Run the process, **Recommend the Most Popular Learning**, with the recommendation category, Popular with others in your job. It's recommended to select the **Recalculate recommendations** checkbox as it considers the learning items completed over the past six months to generate recommendations. If you don't select this checkbox, the process considers learning completions over the past week to generate the recommendations. It's recommended to run this process on a weekly basis. If any learning items match the criteria specified in this process, those learning items appear here. Or, you can recommend any learning item manually to have it appear in this feed. To do so, follow these steps: 1. Go to **My Client Groups** > **Learning** and select a learning item, **Courses**, for example. 2. On the Courses page, select the course that you want to recommend. 3. Click **Learners** from the side panel, and then select **Recommendation** from the **Add Learners** menu. 4. Select the recommendation category as **Popular with others in your job**, and click **Next**. 5. Add the name of the employee, and click **Submit**. These steps trigger the **Process Learning Recommendations** job which creates the learning recommendation.
Popular in your role > List of learning topic communities	Learning	Administrator task: Run the process, **Recommend the Most Popular Learning**, with the recommendation category, Topics popular in my role. If any topic communities match the criteria specified in this process, those appear here. Or, you can recommend any topic community manually to have it appear in this list. To do so, follow these steps: 1. Go to **My Client Groups** > **Learning** and select **Learning Assignments**. 2. Select **Recommendation** from the **Add Learners** menu. 3. On the Recommend Learning page, click **Select Item**. 4. Search for the topic community that you want to recommend. 5. Click **Add Item** on the topic community. 6. Select the recommendation category as **Topics popular in my role**, and click **Next**. 7. Add the name of the employee, and click **Submit**. These steps trigger the **Process Learning Recommendations** job which creates the learning recommendation.
Popular in your role > List of skills	Dynamic Skills	Administrator task: • Enable the profile option ORA_HRT_AI_SKILLS_ASSISTANT This generates skill recommendations based on the employee's job role in Skills Center. The first 12 skills from these recommendations appear here.

Excel in Your Current Role	Product Requirements	Additional Setup Tasks
Popular in your role > List of gigs	Opportunity Marketplace	• Trending gigs must exist for the employee's current role in Opportunity Marketplace. Gigs are included in the trending list if least five employees have applied to them or marked them as favorites. The posting date of the gigs must be less than six months from the current date. • The skills defined in the Skill Center section of the employee's job profile must match the skills in the trending gig. Note that even if you've defined a position profile for the employee's role, you need to also define a job profile for this swim lane to display data. • The trending gigs with the most number of skill matches appear first in the carousel. Trending gigs without matching skills appear last in the carousel.
Popular in your role > List of development journeys	Journeys	• The most commonly assigned journeys of the category, Career Development, appear here.
Popular in your role > List of connections	Connections, Learning Optional: Opportunity Marketplace	• 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.

Note: In addition to the above setup, these swim lanes will appear only if there's data to display in them and if the employee has the required data security privilege and function security privilege in the products that generate this data.

Related Topics

- How You Create Journeys
- How Journeys are Assigned
- Create a Gig Using Opportunity Marketplace
- Person Profile Type and Learning Outcomes for Oracle Learning Courses and Specializations
- Search and Browse the Learning Catalog
- Set Profile Option Values

Additional Set Up for Grow Your Career Tab

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

Grow Your Career	Product Requirements	Additional Setup Tasks
Skills you're developing to grow your career	Learning, Career Development	Administrator task: • Define a job profile for the employee's career of interest from **My Client Groups** > **Profiles** > **Job Profiles**. Note that even if you've defined a position

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Grow Your Career	Product Requirements	Additional Setup Tasks
		profile for the career of interest, you need to also have a job profile defined to display data in this swim lane.
		• Add skills in the Skills Center content section of the job profile and don't mark them as Required. These optional skills will be considered for this feed.
		• Ensure that one or more of these skills are present in the Learning Outcomes section of a learning item. For details on adding learning outcomes, see the Related Topics section.
Skills and qualifications for the {CAREER_OF_INTEREST} role	Career Development, Learning, Opportunity Marketplace, Dynamic Skills	This swim lane appears when these criteria are met: • The ORA_WLF_ENABLE_GROW_RECOMMENDATIONS profile option is set to **Yes**. • Learning recommendations are set up using the Recommendation Profiles application. Employee task: • Choose careers of your interest. To do so, click the **Careers of interest** link from the side panel in Grow. On the listing page, find a career you're interested in. Click the career role card, and on the career details page, click **Add to Favorites**. Administrator task: • Define a job profile for the employee's career of interest from **My Client Groups** > **Profiles** > **Job Profiles**. Note that even if you've defined a position profile for the career of interest, you need to also have a job profile defined to display data in this swim lane. • Set up learning recommendations using the Recommendation Profiles application (available in **My Client Groups**). For more information, see the topic *Recommend Learning from the Recommendation Profiles Page*.
Suggested learning for your careers of interest	Career Development, Learning Optional: Opportunity Marketplace, Recruiting, Dynamic Skills	This swim lane appears instead of the **Skills and qualifications for the {CAREER_OF_INTEREST} role** only if the ORA_WLF_ENABLE_GROW_RECOMMENDATIONS profile option is set to **No**, and data is set up using the steps below. Administrator task: • Define a job profile for the employee's career of interest from **My Client Groups** > **Profiles** > **Job Profiles**. Note that even if you've defined a position profile for the career of interest, you need to also have a job profile defined to display data in this swim lane. • Add skills in the Skill Center section of the job profile and mark those skills as Required. • Ensure that one or more of these required skills are present in the Learning Outcomes section of a learning item. For details on adding learning outcomes, see the Related Topics section. Employee task: • Choose careers of your interest. To do so, click the **Careers of interest** link from the side panel in Grow. On the listing page, find a career you're interested in. Click the career role card, and on the career details page, click **Add to Favorites**.
Learning based on your favorite gigs	Opportunity Marketplace, Dynamic Skills, Learning	Employee task:

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Grow Your Career	Product Requirements	Additional Setup Tasks
		• Choose favorite gigs. Click the **Gigs** link on the side panel in Grow, select a gig that you're interested in and click **Add to Favorites** from the **Actions** menu. Administrator task: • Add skills to the favorite gigs. These skills must match the skills that aren't marked as Required in the employee's job profile. Note that even if you've defined a position profile for the employee's role, you also need to have a job profile defined to display data in this swim lane. • Ensure that one or more skills added to the favorite gigs are present in the Learning Outcomes section of a learning item. For details on these tasks, see the Related Topics section.
Learning to prepare for your favorite jobs	Opportunity Marketplace, Dynamic Skills, Learning	Employee task: • Choose favorite jobs. Click the **Jobs** link on the side panel in Grow, select a job that you're interested in and click **Add to Favorites** from the **Actions** menu. Administrator task: • Add skills to the favorite jobs. The skills added to the job must match the skills that aren't marked as Required in the employee's job profile. Note that even if you've defined a position profile for the employee's role, you also need to have a job profile defined to display data in this swim lane. • Ensure that one or more skills added to the favorite jobs are present in the Learning Outcomes section of a learning item. For details on these tasks, see the Related Topics section.
Popular in your careers of interest > List of learning items	Career Development, Learning	Employee task: • Choose careers of your interest. To do so, click the **Careers of interest** link from the side panel in Grow. On the listing page, find a career you're interested in. Click the career role card, and on the career details page, click **Add to Favorites**. Administrator task: Run the process, **Recommend the Most Popular Learning**, with the recommendation category as: Popular with others in your careers of interest. It's recommended to select the **Recalculate recommendations** checkbox as it considers the learning items completed over the past six months to generate recommendations. If you don't select this checkbox, the process considers learning completions over the past week to generate the recommendations. It's recommended to run this process on a weekly basis. If any learning items match the criteria specified in this process, those learning items appear here. Or, you can recommend any learning item manually to have it appear in this feed. To do so, follow these steps: 1. Go to **My Client Groups** > **Learning** and select a learning item, **Courses**, for example. 2. On the Courses page, select the course that you want to recommend. 3. Click **Learners** from the side panel, and then select **Recommendation** from the **Add Learners** menu. 4. Select the recommendation category as **Popular with others in your careers of interest** and click **Next**. 5. Add the name of the employee and click **Submit**.

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Grow Your Career	Product Requirements	Additional Setup Tasks
		These steps trigger the **Process Learning Recommendations** job which creates the learning recommendation.
Popular in your careers of interest > List of skills	Career Development, Dynamic Skills	Administrator task: • Define a job profile for the employee's career of interest from **My Client Groups** > **Profiles** > **Job Profiles**. Note that even if you've defined a position profile for the career of interest, you need to also have a job profile defined to display data in this swim lane. • Add skills to the Skills Center content section of the job profile. At a minimum, mark one or more skills as Required. • Enable the profile option ORA_HRT_AI_SKILLS_ASSISTANT.
Popular in your careers of interest > List of gigs	Career Development, Opportunity Marketplace Optional: Dynamic Skills	• Trending gigs must exist for the employee's career of interest. Gigs are included in the trending list if least five employees have applied to them or marked them as favorites. The posting date of the gig must be less than six months from the current date. • The skills defined in the Skill Center section of the job profile of the career of interest must match the skills in the trending gig. Note that even if you've defined a position profile for the career of interest, you need to also have a job profile defined to display data in this swim lane. • The trending gigs with the most number of skill matches appear first in the carousel. Trending gigs without matching skills appear last in the carousel.
Popular in your careers of interest > List of jobs	Career Development, Opportunity Marketplace, Recruiting	• Trending jobs must exist for the employee's career of interest. Jobs are included in the trending list if least five employees have applied to them or marked them as favorites. The posting date of the job must be less than six months from the current date. • The skills defined in the Skill Center section of the job profile of the career of interest must match the skills in the trending job. Note that even if you've defined a position profile for the career of interest, you need to also have a job profile defined to display data in this swim lane. • The trending jobs with the most number of skill matches appear first in the carousel. Trending jobs without matching skills appear last in the carousel.
Popular in your careers of interest > List of development journeys	Journeys	• All global journeys of the Career Development category appear here.
Popular in your careers of interest > List of connections	Connections, Learning Optional: Opportunity Marketplace	• Connections that are marked as favorites by others in the same job role as the employee's career of interest appear here. If these connections have completed any career development activities such as learning or gigs, they appear here in the order of the most number of activities completed.

Note: These swim lanes appear only if there's data to display and only if you have the required data security privilege and function security privilege in the products that generate this data.

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Related Topics

- Create a Gig Using Opportunity Marketplace
- Create a Job Using Opportunity Marketplace
- Person Profile Type and Learning Outcomes for Oracle Learning Courses and Specializations
- Set Profile Option Values

Set Up for Enabling the Grow Banner

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

1. Create a filtered list that defines the target audience that can view the banner in Grow. Select the object as **Workers** and subscriber as **HCM Communicate**. For more information on creating a filtered list, see the topic, *Create Filtered Lists.*
2. In the Campaigns app (available as part of HCM Communicate in **My Client Groups** > **Show More**), create a banner post for Grow.
3. Define the audience by selecting the filtered list that you created.
4. Define the details of the banner and select the destination as **Grow**.
5. Create the banner title and message that'll be displayed on the Grow page. Select a dismiss action to appear on the banner or add a custom URL to help users navigate to an external page or application.
6. Preview the banner message and click **Submit** to activate it.

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

Related Topics

- Create a Grow Post

How to Ingest External Files Containing Skill Data

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

To use the Skills Library Training process, you need to include the skill data in a JSON file format and upload the file. Skill data can come from one or more of these object types:

- Requisitions
- Candidates
- Applicants
- Job
- Skills

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- Person

- Position

- Catalog

- Learning items

You can upload more than one JSON file to a process. Each file must contain data about a specific object type from the above list.

When skill data from these object types is added to the AI object store, the AI engine analyzes this data and fine-tunes the AI skills model to provide better suggestions that are relevant to your business needs.

You need to have the Manage Bulk Skills Library Training privilege (WLF_MANAGE_BULK_SKILLS_LIBRARY_TRAINING) to run this advisor process.

JSON File Specifications

- Each JSON file should be less than or equal to 512 MB. The file name must be in this format:
  `Source_Objecttype_yyyyMMdd_HHmmss.json.`

- For the object type in the file name, you need to choose from one of these: requisitions, candidates, applicants, job, person, position, catalog, skills, or learning items. For example, a valid file name would be:
  `Oracle_person_20240817_123045.json.`

- The file name must be unique and shouldn't have been used in any other existing process, including completed processes.

- The metadata definition in the JSON file must contain these fields: `source, object_type, version`, and `isoCreationDate.`

To configure and run this process:

1. On the **My Client Groups** > **Learning** page, click **Advisor Processes**.
2. From the **Add** menu, select **Skills Library Training**.
3. Enter a name and description for the process.
4. Upload a JSON file that contains the data you want to import.
5. Click **Apply**.
6. Select the process and click **Run Process**.

What to do next

- After the process completes, you can edit it by changing the name and description or adding more attachments. If you add attachments and run the process again, the attachments uploaded earlier won't be processed. Only the new attachments will be processed.

- You can delete a completed process. This won't retract the data that's already added to the AI object store.

Enrich Your Skills Library

The Skills Library Enrichment process leverages the power of Oracle AI to help you enrich your skills library for your business needs and provides you the flexibility of curating the skills suggested by AI.

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

When configuring this process, you can set a confidence score threshold, which allows any skills that receive a score of this threshold or higher to be automatically added to the skill catalog of your choice without your review.

You can also set a confidence score threshold that allows any skill receiving a score above this threshold value, but below the auto-approval threshold value, to be added to your skill catalog in a 'Needs Review' status. Note that skills in this status are only visible to catalog administrators, giving them the ability to review these skills either in Microsoft Excel or from **My Client Groups** > **Profiles** > **Item Catalogs**. Any skills that are below the level of the 'Needs Review' threshold won't get added to the skill catalog for any review.

While configuring this process, you must also specify the skill catalog to which you want to add the AI skill suggestions. Two predefined catalogs are available for your use: Oracle Dynamic Skills Seed Library with predefined skills and Skills Library, which is an empty catalog. To use your own custom-defined skill catalog, you must create an item catalog of type Skill and associate it with a Skills Center-subscribed content section.

To view this process, an administrator needs to have the functional security privilege, WLF_MANAGE_BULK_SKILLS_LIBRARY_ENRICHMENT.

1. Configure and run this process:
    a. On the **My Client Groups** > **Learning** page, click **Advisor Processes**.
    b. From the **Add** menu, select **Skills Library Enrichment**.
    c. Enter a name and description for the process.
    d. Specify the confidence score values to filter skills for your review and for automatic approval. If you don't specify any confidence score value, you'll need to review all skill suggestions manually.
    e. From **Default item catalog**, select one of the predefined skill catalogs to which the skill suggestions must be added.
    f. Click **Apply**.
    g. Select the process and click **Run Process**.
    h. When the process completes, click **Download and Update**. This downloads a Microsoft Excel workbook where skill suggestions are added by Oracle AI.
2. Review the Microsoft Excel workbook and upload the skills to your skill catalog:

    Note: Before you can review the Excel workbook, you need to download and install the Desktop Integration Installer tool from **Navigator** > **Tools**.

    a. Review the skills that you want to add or remove, and change the approval status in the **Curation Status** column.
    b. (Optional) From the **Item Catalog Name** column, you can also choose a different skill catalog to add the skills to .
    c. On the **Oracle Visual Builder** tab in the Microsoft Excel plug-in, click **Upload Changes**.
3. Verify whether the skills are added to the skill catalog:
    a. On the **My Client Groups** > **Profiles** page, click **Item Catalogs**.
    b. From the **Actions** menu (displayed as three dots) next to your skill catalog, select **View and Edit Content Items**. You'll see the list of skills that were automatically approved and manually approved.

        Note: You can also curate skills directly from this page. To do so, edit a skill and set it as 'Approved' or 'Rejected'. Only 'Approved' skills are added to the skill catalog and available to users.

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Related Topics

- Skill Item Catalogs
- Content Section Properties
- Content Items

View Your Career Interests and Objectives

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

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

- Your career progression path (based on the job path) and role-specific details for each career in that path.
- Skills you already have or are interested in developing. You can see the required skills added for your position or job in Skills Center and also discover more skills relevant for your position or job and add them to your profile. The skills that you chose recently from Skills Center appear first.
- 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.

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

- 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 Your Career Path

Viewing your career progression path can help you to plan for your career growth. The career details page displays your career progression path and the qualifications, skills, and competencies needed for each of the careers on that path.

To view the career details page from Grow, click the **Know your role** button on the side panel.

Note: This button is available only if your HR specialist has set up a position profile or job profile for you.

The career details page displays details for your current role depending on these criteria:

- If you have both position and job profiles associated with your role, the page displays details related to your position.
- If you have no position profile associated with your role but a job profile associated, the page displays details related to your job.

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It displays these details for your current role:

- Skills and competencies associated with your position or job.

- Resources available to address skill gaps, if any.

- Learning resources for your position or job.

- Gigs, job recommendations, and connections related to your position or job.

If you don't have either a job profile or position profile associated, you can't view the career details page. You'll see the business title for your assignment displayed on the side panel. If you have multiple job assignments, you'll see the business title for your primary job assignment.

View Your Career Progression Path

The career details page displays your career progression path if it has been defined in the job or position details of that career. This path lists the next three jobs in the progression hierarchy of the career. Note that you can see only a single progression path for a career.

Apart from your current role, the other career names shown on the career progression path depends on whether an active job profile or position profile is associated with the career.

You can add one or more careers from the career progression path to your careers of interest.

Explore Your Careers of Interest

The **Careers of Interest** link on the side panel will take you to the new Career Development experience in Opportunity Marketplace, with the **Career Roles** filter applied by default. You can search for career roles from here.

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

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

- The career progression path, if it's defined for the role.

- Job description.

- Required skills for the role. Skills that you have are listed first with a color-coded indicator, followed by skills that you're yet to achieve.

- Functional competencies such as languages, educational qualifications, accomplishments, licenses and certifications, and so on, that are required and good-to-have for the role. If you're yet to gain any of these competencies, you'll see an option to add it as a goal to your goal plan.

- Work requirements such as travel, working hours, and so on, are displayed in the Additional Information section.

- Learning suggestions and career ambassadors to help you bridge the skills and qualifications gaps required for that role. If no learning resources or career ambassadors are available for the role, this section will be empty.

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

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

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Related Topics
- Model Profile Types
- Sign Up to Be a Career Ambassador
- Create a Job Requisition Based on a Job

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 your 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 swim lanes with the corresponding actions or suggestions to close skill gaps and excel in your role. Some swim lanes have changed in upgrade 24D depending on whether the ORA_WLF_ENABLE_GROW_RECOMMENDATIONS profile option is set to **Yes** or **No**.

This table lists the swim lane titles and their order depending on the setting of this profile option. For more information, see the topic *Additional Set Up for Excel In Your Current Role Tab*.

Profile Option = Yes		Profile Option = No	
Position	**Swim Lane**	**Position**	**Swim Lane**
1	Tasks to finish	1	Tasks to finish
2	Skills assigned by your manager	2	Suggested learning for you
3	Resources to meet job requirements		
4	Your current learning	3	Your current learning
5	(Banner) Feeling inspired	4	(Banner) Feeling inspired
6	Your current development journeys	5	Your current development journeys

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Profile Option = Yes		Profile Option = No	
7	New learning in topics you follow	6	New learning in topics you follow
8	Learning based on your favorite gigs	7	Learning based on your favorite gigs
9	Learning popular with your coworkers	8	Learning popular with your coworkers
10	Popular in your role	9	Popular in your role
10a	(No title) Learning items popular in your role	9a	(No title) Learning items popular in your role
10b	(No title) Learning topic communities popular in your role	9b	(No title) Learning topic communities popular in your role
10c	(No title) Skills popular in your role	9c	(No title) Skills popular in your role
10d	(No title) Gigs popular in your role	9d	(No title) Gigs popular in your role
10e	(No title) Development journeys popular in your role	9e	(No title) Development journeys popular in your role
10f	(No title) Connections popular in your role	9f	(No title) Connections popular in your role

Actions or Suggestions Displayed in Swim Lanes

- **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.

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

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

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

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

- **Your 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.

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

- **Learning based on your favorite gigs** – Learning that helps you qualify for your favorite gigs by developing skills that are marked as required for your current role.

- **Learning popular with your coworkers** – Voluntary learning that's completed recently by your manager and peers is considered as popular or trending.

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- **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.

    o 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.
    o Topic communities that are popular in your job role across the organization.
    o Skills suggested for your current job role, specifically based on your job title, ranked by occurrence across the application.
    o 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.
    o All global journeys of the Career Development category that have been assigned to employees in your organization.
    o 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 swim lanes with the corresponding actions or suggestions to help you work toward your career growth. Some swim lanes have changed in upgrade 24D depending on whether the ORA_WLF_ENABLE_GROW_RECOMMENDATIONS profile option is set to **Yes** or **No**.

This table lists the swim lane titles and their order depending on the setting of this profile option. For more information, see the topic *Additional Set Up for Grow Your Career Tab*.

Profile Option = Yes		Profile Option = No	
Position	Swim Lane	Position	Swim Lane
1	Skills you're developing to grow your career (renamed from Suggested learning for your skills)	1	Skills you're developing to grow your career (renamed from Suggested learning for your skills)

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Profile Option = Yes		Profile Option = No	
2 (A swim lane for each role)	Skills and qualifications for the {CAREER_OF_INTEREST} role	2	Suggested learning for your careers of interest
3	Learning based on your favorite gigs	3	Learning based on your favorite gigs
4	Learning to prepare for your favorite jobs	4	Learning to prepare for your favorite jobs
5	(Banner) Feeling inspired	5	(Banner) Feeling inspired
6	Popular in your careers of interest	6	Popular in your careers of interest
6a	(No title) Learning items popular in your careers of interest	6a	(No title) Learning items popular in your careers of interest
6b	(No title) Skills popular in your careers of interest	6b	(No title) Skills popular in your careers of interest
6c	(No title) Gigs popular in your careers of interest	6c	(No title) Gigs popular in your careers of interest
6d	(No title) Jobs popular in your careers of interest	6d	(No title) Jobs popular in your careers of interest
6e	(No title) Development journeys popular in your careers of interest	6e	(No title) Development journeys popular in your careers of interest
6f	(No title) Connections popular in your careers of interest	6f	(No title) Connections popular in your careers of interest

Actions or Suggestions Displayed in Swim Lanes

- **Skills you're developing to grow your career** – It displays learning suggestions for one or more of these skills:
    - Skills you're interested in and have assigned to yourself
    - Skills that aren't marked as required by your manager
    - Skills that aren't marked as required for your current role

- **Skills and qualifications for the {CAREER_OF_INTEREST} role** – If this swim lane appears depending on the profile option setting, then this title is repeated for every career role you're interested in. For example, if you're interested in the Security Engineer role, it'll read as **Skills and qualifications for the Security Engineer role**. Here, you'll see learning recommendations that help you qualify for your careers of interest by filling gaps in your skills and qualifications. They're displayed in the order of learning that can help cover the most gaps.

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

- **Learning based on your favorite gigs** – Learning that helps you qualify for your favorite gigs by developing skills that aren't marked as required for your current role.

- **Learning to prepare for your favorite jobs** – Learning that helps you qualify for your favorite jobs by developing skills that aren't marked as required for your current role.

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

> **Note:** Current learning, current development journeys, and development journeys that might interest you appear in this feed if the administrator has turned them on. They will show the same items as those for your current role.

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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	- Application Implementation Consultant (ORA_ASM_APPLICATION_ IMPLEMENTATION_CONSULTANT_JOB) - Human Capital Management Application Administrator (ORA_HRC_HUMAN_ CAPITAL_MANAGEMENT_APPLICATION_ ADMINISTRATOR_JOB)	If you're an administrator who needs to create and assign roles to users in your organization, refer to the HCM Communicate Setup chapter. Here are the tasks you can perform: - *Enable HCM Communicate* - *Assign the Campaign Administrator Role*

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User Type	Roles or Privileges Required	User Capabilities
		• *Assign the Campaign Manager Role*
Campaign Administrator	• Employee Campaign Administrator (ORA_IRC_EMPLOYEE_CAMPAIGN_ ADMINISTRATOR_JOB) • Human Capital Management Application Administrator (ORA_HRC_HUMAN_ CAPITAL_MANAGEMENT_APPLICATION_ ADMINISTRATOR_JOB) • Application Implementation Consultant (ORA_ASM_APPLICATION_ IMPLEMENTATION_CONSULTANT_JOB) • Manage All HCM Communicate Campaigns (ORA_IRC_MANAGE_ALL_ HCM_COMMUNICATE_CAMPAIGNS). Optionally add this security privilege to view and manage all campaigns even if you're not the owner or a member of the communication team.	If you're assigned a Campaign Administrator role, refer to the HCM Communicate for Campaign Administrators chapter. Here are the tasks you can perform: • *Create an Email Template* • *Create a Predefined Link* • *Create an Email Sender Profile* • *Create a Predefined Audience Using Eligibility Profiles* • *Create a Communication Team*
Campaign Manager	• Employee Campaign Manager (ORA_IRC_ EMPLOYEE_CAMPAIGN_MANAGER_JOB) • Use REST Service - Eligibility Object Results for Benefits (ORA_BEN_REST_SERVICE_ACCESS_ELIGIE • Use REST Service - Benefits Lists of Values (BEN_REST_SERVICE_ACCESS_BENEFITS_L • Use REST Service - Eligibility Objects (BEN_REST_SERVICE_ACCESS_ELIGIBILITY For journey related campaigns you need these: • View Global Journeys (PER_VIEW_GLOBAL_JOURNEYS_PRIV) – functional privilege to view journeys • Explore option enabled in the Checklist template in the Security tab	If you're assigned a Campaign Manager role, refer to the HCM Communicate for Campaign Managers chapter. Here are the tasks you can perform: • *Create a General Communication Campaign* • *Create a Get Response Communication Campaign* • *Create a Promote Journey Communication Campaign* • *Select the Audience of a Communication Campaign* • *Create an Email for a Communication Campaign* • *Create a Follow-Up Email for a Communication Campaign* • *Schedule a Communication Email* • *Activate a Communication Campaign*

Security Reference

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

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

Introduction to Communication Campaigns

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

With an email/SMS type of campaign, you can use emails and SMS messages to communicate with a target audience. With a post type of campaign, you design posts and publish them to My Activity Center and Grow pages of your preferred audience.

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)

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Here's what to do

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

Results:

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

What to do next

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

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

Assign the Campaign Manager Role

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

Before you start

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

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

Here's what to do

1. Navigate to **Navigator** > **Tools** > **Security Console**.
2. Click the **Roles** tab.
3. On the Roles page, click **Create Role**.
4. On the Create Role: Basic Information page, enter a role name (Campaign Manager), role code, and role category (HCM - Job Roles).
5. Click **Next**.
6. On the Create Role Campaign Manager: Function Security Policies page, click **Add Functional Security Policy** and add these privileges:
   - Use REST Service - Benefits Lists of Values

   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.	*Create an Email Template*
Manage Predefined Links	Task to create predefined links that are available to campaign managers when they create emails for a communication campaign.	*Create a Predefined Link*
Manage Email Profiles	Task to create email sender profiles that are available to campaign managers when they create emails for communication campaigns.	*Create an Email Sender Profile*

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

Create an Email Template

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

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

Before you start

You need the Campaign Administrator role.

Here's what to do

1. In the Setup and Maintenance work area, go to:
    a. Offering: 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.

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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.

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Here's what to do

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

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

Results:

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

Create a Predefined Audience Using Eligibility Profiles

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

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

Before you start

You need the Campaign Administrator role.

Here's what to do

1. In the Setup and Maintenance work area, go to:
   a. Offering: HCM Communicate
   b. Functional Area: Employee Communications
   c. Task: Manage Predefined Audience Criteria
2. On the Manage Predefined Audience Criteria page, click **Create** and select **Create Participant Profile**.

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3. On the Create Participant Eligibility Profile page, enter the following info in the Eligibility Profile Definition section:

   ○ Name: Enter a name for the eligibility profile.

   ○ Profile Type: This is prefixed as Participant.

   ○ Profile Usage: Determines the type of objects you can associate with the profile. Select Employee Communications or Global. Selecting Global makes the profile available to multiple business process usages.

   ○ Description: Enter a description for the eligibility profile.

   ○ Assignment to Use: This is prefixed as Specific assignment. This will take into consideration all employees who are permanent, on contract, or both.

   ○ Status: Set it to active so that campaign managers can select this predefined audience when creating an employee communication campaign.

4. In the Eligibility Criteria section, select eligibility criteria and sub criteria. Define the sequence, name, whether you want to exclude the criteria from eligibility, and the criteria start and end dates.

5. Click **Save and Close**.

What to do next

You can use predefined audiences when creating a communication team.

Related Topics
- Create a Predefined Audience Using Filtered Lists
- Eligibility Profiles

Create a Predefined Audience Using Filtered Lists

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

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

Before you start

You need the campaign administrator role.

Here's what to do

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

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

Create a Communication Team

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

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

Before you start

You need the Campaign Administrator role.

Here's what to do

1. In the Setup and Maintenance work area, go to:
    a. Offering: HCM Communicate
    b. Functional Area: Employee Communications
    c. Task: Manage Communication Teams
2. On the Manage Communication Teams page, click **Add**.
3. In the Details section, enter a name and description for the communication team. Select the campaign purpose.
    - General: Select this option for general communications where a response isn't required. For example, a list of holidays.
    - Get Responses: Select this option to solicit a response on a particular subject. For example, asking employees if they prefer to work from home or the office.
    - Promote Journey: Select this option for a journey's related communication campaign. For example, a journey that's already assigned to employees, or to alert employees about a journey.
    - Promote Learning: Select this option to notify learners about a learning campaign. For example, suggest training modules.
    - Select All if you want the communication team to create General, Get Responses, Promote Journey, and Promote Learning communication campaigns.
4. In the Team Members section, add campaign managers within your organization who can use the sender profile and predefined audience configurations defined for this specific team.
5. In the Sender Profile section, select all possible sender profiles that could be used by this communication team when sending out communications to employees. The list contains the sender profiles that you created.
6. In the Audience section, select all possible audiences that could be used by this communication team when sending out communications to employees. The list contains the predefined audiences that you created.
7. In the Email Templates section, select the basic and advanced email templates you want to make available for this communication team. The list contains active templates only.
8. Click **Save and Close**.
9. On the Manage Communications Team page, select the Activate option for the team.

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Configure SMS for Campaigns

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

Before you start

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

Here's what to do

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

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

Add Alternative Contact Details

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

Before you start

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

You can set up more contact details and an order of preference for a communication team. The preference order of the contact details determines the order in which the campaign sends a communication. For example, set the order of preference for email to Work, Home, and then Campus. When sending an email communication, the application would

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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

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Select the Audience of a Communication Campaign

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

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

Before you start

You need the Campaign Manager role.

Here's what to do

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

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

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

Results:

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

What to do next

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

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

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HCM Communicate for Email and SMS Campaigns

Create a General Communication Campaign

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

Before you start

You need the campaign manager role.

Here's what to do

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

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

Create a Get Response Communication Campaign

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

Before you start

You need the campaign manager role.

Here's what to do

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

   A communication team uses predefined audiences and sender profiles. The communications team determines the types of campaign purpose you can select.
4. Select whether you want to run a one-time campaign or an ongoing one. Select Ongoing to continuously send campaign communications to target newly eligible employees. Select One-time to target employees who meet a certain eligibility criteria.

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5. Select **Get Responses** for the campaign's purpose.
6. When you select Get Responses, provide the following info.
    a. A response summary title to display on the campaign Overview page.
    b. Select **Hide responses** to display the responses to the get response request at an aggregate level. You won't find out the response of a specific audience member. Select **Show responses** to drill down on a response request to understand each audience member's response to the get response request. You can see this info in the Overview tab of a campaign.
    c. In the Response Choices section, click **Add** to add response choices.
    d. Enter a response. For example, I want to work from home, or I want to work from the office. Responses display to employees in the form of a button or link.
    e. Select the **Use Thank You Page** option if you want the application to take employees to a Thank You page after they provide a response.
    f. Enter a URL for the application to open for employees after they provide a response.
7. Select the campaign owners, they'll see the campaign in the list of communication campaigns. Each owner has the same privileges as the campaign manager if they have the campaign manager role.
8. Click **Save and Close**.

Create a Promote Journey Communication Campaign

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

Before you start

You need the campaign manager role.

Here's what to do

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

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

Create a Learning Communication Campaign

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

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

Before you start

You need the learning specialist and campaign manager roles.

Here's what to do

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

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

Create an Email for a Communication Campaign

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

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

Before you start

You need the Campaign Manager role.

Here's what to do

1. In My Client Groups, click **Communicate**.
2. On the Communicate page, open a communication campaign.
3. Click the **Content** tab.
4. Click the **Add** button and select **Email**.

5. In the Sender Profile section, select a predefined sender profile. This populates the following fields:
   - From Display Name
   - From Email Address
   - Reply to Display Name
   - Reply to Email Address

6. In the Emails section, create the primary email to send to the entire audience.
   a. Enter a name for the email. The name is used as the subject of the primary email.
   b. Select a template. You can create your own email using a blank form. With a blank form, you can copy formatted text from an external source and paste it successfully into the email designer editor. You can also select a predefined email and use it as-is or personalize it using the email designer editor.

7. Click **Save**.

8. Select the **Send Test Email** option if you want to send a test email using the sender profile before activating the campaign.

Results:

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

What to do next

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

Related Topics
   - Overview of the Email Designer

Create a Follow-Up Email for a Communication Campaign

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

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

Before you start

You need the Campaign Manager role.

Here's what to do

1. In My Client Groups, click **Communicate**.
2. On the Communicate page, open a communication campaign.
3. Click the **Content** tab.
4. Click the **Add** button and select **Email**.
5. Enter a name for the follow-up email.

6. Select a template. You can create your own email using a blank form. With a blank form, you can copy formatted text from an external source and paste it successfully into the email designer editor. You can also select a predefined email and use it as-is or personalize it using the email design editor.

7. Select the audience. You can select the entire audience defined in the primary email, or you can select the audience who opened or not the primary email. For a Get Response communication campaigns, you can also the audience who provided a response or not.

8. Click **Save**.

Results:

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

Related Topics
- Overview of the Email Designer

Schedule a Communication Email

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

You can schedule an email when its status is Draft.

Before you start
You need the Campaign Manager role.

Here's what to do

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

Results:
The status of the email is now set to Scheduled.

Create an SMS for a Communication Campaign

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

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

Here's what to do

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

What to do next

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

Activate a Communication Campaign

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

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

Before you start

You need the Campaign Manager role.

Here's what to do

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

Results:

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

What to do next

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

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

Communication Campaign Metrics

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

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

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

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

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

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

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

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

HCM Communicate for Posts

Create a My Activity Center Post

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

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

Before you start
You need the campaign manager role.

Here's what to do

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

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

   When you define two actions on the banner, the first action is a custom action by default. The second action can either be a custom or dismiss action.

9. Review a preview of the banner and its actions.
10. Submit the campaign and the campaign is scheduled.
11. Review the metrics to measure employee engagement, such as unique clicks and views.

Create a Grow Post

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

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

All post campaigns are one-time only campaigns.

Before you start

You need the campaign manager role.

Here's what to do

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

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

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Activate a Post Communication Campaign

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

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

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

- End date

- Banner title and subtitle

- Action labels

Post Communication Campaign Metrics

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

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

Unpublish a Post Communication Campaign

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

- When the date of the post is reached.

- When the employee selects the Dismiss action on the banner.

- When the campaign manager cancels a campaign that's in progress.

Create a Team Post

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

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

All post campaigns are one-time only campaigns.

Before you start

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You need the line manager role.

Here's what to do

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

Scheduled Processes

Scheduled Processes for HCM Communicate

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

Scheduled Process	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
Refresh HCM Communicate Audience	Determines and updates the recipient list to target for upcoming campaigns based on configured criteria.	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

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Scheduled Process	Description	When to Run	Who Runs It	Recommended Frequency
Publish Communicate Posts	Publish posts for My Activity Center, Grow, and My Team.	When you submit a post for publishing.	Campaign Administrator	Every 24 hours

Related Topics
- Submit Scheduled Processes and Process Sets

Email Designer

Overview of the Email Designer

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

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

The email designer displays these details:

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

These widgets help you design the email.

- Paragraph:
    - Enter text and format it with several formatting options.
    - Copy and paste text and images from MS Word and Google Docs.
- Image:
    - Add images to the email.
    - Enter the URL where the image is located or select an image from the media library.
    - Define the width, height, background color, and alignment of the image.
- Rule:
    - Add rules to create partitions between various sections of the email.
    - Define the rule color, width, alignment, and background color.

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- Headline:
    - Add a headline to the email by entering headline text.
    - Define the text color, text style, background color, and align the text.
    - Add links and tokens such as First Name, Last Name, Full Name and Email Address.
- Button:
    - Add buttons and links to the email to obtain responses from employees.
    - Define if the button or link will use an external or a predefined link by the campaign administrator.
    - Enter text to appear on the button or link.
    - Track clicks.
- Space: Add space between various sections of the email.

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

Related Topics
- Upload an Image to the Media Library

Pixel Tracking in HCM Communicate

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

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

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6 **Touchpoints**

Overview of Touchpoints

Introduction to Touchpoints

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

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

As a manager, you can:

- Use pulse surveys to understand employee sentiment on a periodic basis and encourage employees to share their thoughts.
- View real-time insights into your team's sentiment, your extended team's sentiment, and organization's sentiment through pulse survey scores. You can also view pulse score trends for multiple surveys that might be assigned to your team.
- Receive personalized nudges for each employee that enables you to provide timely feedback, send a note of recognition, support them with their goals, and more.
- Schedule recurring check-in meetings with employees to provide guidance and feedback. You can add agenda topics of your choice to these meetings. Touchpoints also recommends discussion topics to address areas that might need immediate attention, such as overdue or pending interactions from your end, low employee sentiment from a recent pulse survey, or gaps in employee's work progress, and so on.
- Recognize and award employees for their achievements or important milestones.
- Provide timely feedback and also request feedback from others.
- View all past and upcoming events and interactions with employees.

As an employee, you can:

- Voice your opinions through the pulse surveys assigned to you.
- View your pulse score trends over a period of time.
- View past events and interactions and upcoming check-ins with your manager and others in the organization, displayed in a timeline view.
- Schedule recurring check-in meetings with your manager. You can add your own topics of discussion to these meetings. You can also add topics recommended by Touchpoints, which are related to your development and performance goals, skills, competencies, feedback, and other insights topics derived based on signals from HCM.
- View upcoming check-ins scheduled by your manager or others in the organization.
- Send feedback or request feedback from your manager and others in the organization.

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- Recognize your manager or colleagues to appreciate their contributions and achievements.

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

Overview of Touchpoints Features

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

Events and Interactions

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

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

Engagement Metrics

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

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

Metric	Description
	• All check-ins that have been held with all direct reports, indirect reports, and dotted-line reports Check-ins include both Touchpoints and Performance check-ins.
Team – Average Check-ins	This is the average number of check-ins that have been scheduled with a manager's direct reports and dotted-line reports over the past 90 days. This analytic is calculated as the total number of check-ins scheduled with reports in the last 90 days divided by the total number of reports who've had at least one check-in the last 90 days. Check-ins include both Touchpoints and Performance check-ins.
Organization – Average Check-ins	This is the average number of check-ins between all managers and their direct reports and dotted-line reports in the entire organization over the past 90 days. This analytic is calculated as the total number of check-ins scheduled with all employees in the last 90 days divided by the total number of employees who've had at least one check-in the last 90 days. Check-ins include both Touchpoints and Performance check-ins.
Pulse score comparison chart	This chart enables managers to analyze pulse trends over a period of time for three groups of employees: direct reports and dotted-line reports, indirect reports (who are downstream in the organization hierarchy), and all employees in the organization. It displays pulse score averages for every survey that's assigned to each group. The analytic is calculated as the sum of all the pulse scores for each group divided by the total number of employees in that group that responded to the pulse survey. It displays the pulse score averages over a period of time, which depends on the survey frequency specified while configuring the survey: • If the survey frequency is daily, the scores are displayed for the past 7 days from the current date. • If the survey frequency is weekly, the scores are displayed for the past 6 weeks from the current week. • If the survey frequency is monthly, the scores are displayed for the past 6 months from the current month. • If the survey frequency is yearly, the scores are displayed for the past 6 years from the current year. • If the survey frequency is set to a specific frequency, the scores are displayed for the past 18 periods from the current period. **Note:** The x-axis on the pulse score comparison chart shows the survey end date for each frequency.
Employee pulse scores	These are individual pulse scores for a manager's direct reports and dotted-line reports, which are computed based on the pulse survey completed by each employee. The lowest pulse scores are displayed first in this section. The pulse score is defined and calculated through the scoring option set on the survey questionnaire. The threshold value for deciding low scores is configured in the survey definition using the Checklist Templates task.
Number of check-ins completed per month	These are check-in meetings held between a manager and their direct reports and dotted-line reports, with all topics marked as completed in the current month. Check-ins include both Touchpoints and Performance check-ins.

Metric	Description
Number of check-ins not completed per month	These are check-in meetings held between a manager and their direct reports and dotted-line reports, with some topics marked as not completed in the current month. Check-ins include both Touchpoints and Performance check-ins.

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

Nudges

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

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

Nudges include the following:

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

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Nudge Reason	Purpose
Employee has a low response rate to the pulse survey	Encourages the employee and the manager to improve the employee's participation in pulse surveys

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

Configure Touchpoints

User Roles and Privileges for Touchpoints

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

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

Nudges

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

Recognitions and Awards

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

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

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

- To send recognitions, the employee needs to have the Access HCM Celebrate Social Feed (ORA_CEL_ACCESS_SOCIAL_FEED) aggregate privilege.

- To send an award, the manager needs to have the Award People (CEL_AWARD_PEOPLE) function security privilege.

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

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

- Only one Touchpoints check-in template is active at any given time.
- The review period isn't relevant when defining the template. So use the **All Review Periods** option when defining it.
- Eligibility profile isn't relevant when defining the template. It doesn't appear when you select the Touchpoints template type.
- If your current template doesn't have questionnaires, and you want to include them in future check-ins, you can't edit the template. You must create a new template, add the questionnaires, and make it active.
- If your current template already has questionnaires configured and you want to change the questionnaires or exclude them from the template, you must configure a new template with these changes and make it active. You can't edit the current template to make these changes.
- When you make a new template active, the earlier template will automatically become inactive. This inactive template will still show as "In Use" if any check-ins were created from it before.
- If questionnaires were included in the earlier template and are now excluded from the new template, any check-ins created based on the earlier template will continue to display those questionnaires. Only new check-ins

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created hereafter won't display them. The same behavior applies to changed questionnaires as well. This applies to one-time check-ins and recurring check-ins (which include checks-in scheduled in the past and in future).

- Questionnaires can be marked as done, just like other discussion topics. When they're marked as done, they're included in the completed discussion topic count in the Events and Interactions timeline.

- If you update the check-in template to remove skills as discussion topics, it won't remove existing skill discussion topics in check-in documents that are already created. But it won't be possible to create skill discussion topics in new check-ins.

- If you update the check-in template to remove competencies as discussion topics, it won't remove existing competency discussion topics in check-in documents that are already created. But it won't be possible to create competency discussion topics in new check-ins.

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

To configure the template:

1. Go to **My Client Groups** > **Performance** > **Check-in Templates**.
2. Click **Add** to create a new Touchpoints check-in template.
3. Select the template type as **Touchpoints**.
4. Enter a name for the template and set its status to **Active**.
5. By default, Touchpoints check-ins created from this template will be displayed in the employee's performance document. To change this setting, unselect the **Include in performance document** checkbox.
6. The Check-in content section displays the list of discussion topic types that you can include in a Touchpoints check-in. To include questionnaires for both employees and managers, select the **Questionnaire** checkbox and then select the respective questionnaires from the drop-down lists that appear.
7. Select any other discussion topic type such as **Skills** or **Competencies** that you want to add to the template.
8. Click **Submit**.

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

Related Topics
- Create a Check-In Template

Create and Assign a Touchpoints Survey

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

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

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Create the Questionnaire for a Touchpoints Survey

You create the questionnaire used in a Touchpoints survey by using the Questionnaires application. Here are a few points to consider while creating it:

- Before creating a questionnaire, you need to create a questionnaire template. The subscriber name must be Touchpoints.

- By default, a predefined questionnaire template, **Touchpoints Pulse Survey Template**, and a questionnaire, **Touchpoints Pulse Survey Questionnaire**, are available for use, with a sample question that you can edit.

- Always ensure that you select the scoring option for both the questionnaire and the question. Define question scoring according to your business needs.

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

Here's how you create the questionnaire for a Touchpoints survey:

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

2. Select the **Touchpoints** subscriber. You'll see the predefined questionnaire, **Touchpoints Pulse Survey Questionnaire**, in Draft status, with a sample question. You can either make a copy of this questionnaire, or create a new one.

   To create a new questionnaire, search for the questionnaire template, **Touchpoints Pulse Survey Template**, and create it based on this template.

3. On the Create Questionnaire page or Edit Questionnaire page, specify the details as per your business needs in the respective fields. A few points to note:
   a. It's recommended that you select the overall score calculation rule as **Sum**.
   b. Set the status of the questionnaire to **Active**.
   c. The **Score Questionnaire** checkbox is selected by default, because this is based on the Touchpoints template. Leave this checkbox selected.
   d. Select a pagination option from the **Display Format** list. If you choose to display one section per page, section instructions, if any, appear below the section title. When you display all questions on a single page, questionnaire instructions and section instructions appear below the respective titles.

4. Click **Next**.

5. In the Questions section, you'll see a default question that's available as part of the template. You can edit this question and create more questions that you need. Ensure that each question that you create is scored.

6. After you've added the questions that you need, click **Next**.

7. Click **Preview** to view the questionnaire.

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

8. Click **Save and Close**.

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

Create a Touchpoints Survey Journey

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

The first step in creating the Touchpoints survey is to provide a name for the survey journey and specify its archival and purge criteria.

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

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

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Field	Description

4. Click **OK**.

5. Review the details on the **General** tab. Edit the other details as required. You can enter the effective start and end dates for the survey journey configuration.

6. To finalize the survey journey and use it immediately, set its status to **Active**. Otherwise set it to **Draft**.

7. Click **Save**.

Associate the Questionnaire With the Touchpoints Survey

The next step in the Touchpoints survey creation process is to associate the questionnaire with the Touchpoints survey journey.

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

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

3. Click **Save and Close**.

> **Note:** A Touchpoints survey can have only one task.

Configure the Survey Frequency and Other Attributes

While creating the survey, you need to specify its recurrence frequency to decide when it should start and end and how many times it should run within a specific period. In addition, you also need to specify the analysis period and threshold score of the survey. You configure these attributes using the Checklist page.

1. Click the **Schedule Allocation** tab on the Checklist page.
2. Select the recurrence frequency of the survey in the **Repeat** field. To create a survey with a custom frequency that's not daily, weekly, or monthly, select **Specific**. For example, to create a survey every alternate day of the week, you'll select **Specific**. Complete the fields for each survey frequency as shown in these tables.
    ◦ Daily frequency

Field	Description	Next step
Start On	Enter the start date of the survey.	

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

○ Monthly frequency

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

○ Yearly frequency

Field	Description	Next step
Start On	Enter the start date of the survey.	
Repeat	Select **Year**.	
Repeat in This Month	Select the month on which you want to repeat the survey every year.	
Repeat on This Day	Option 1: Repeat the survey on a specific date in the month.	
	Option 2: Repeat the survey on a specific day of the month. For example, the first Monday of every month.	
End Recurrence	Option 1: End the survey after a specific number of occurrences.	Enter the number of occurrences.

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Field	Description	Next step
	Option 2: End the survey on a specific date.	Enter the end date.

- ○ Specific frequency

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

3. In the **Number of Runs Per Period** field, specify how often you want the survey engine to run during a period so that the survey gets assigned to any new people in the target population. For example, let's say you scheduled a monthly survey for the 1st of every month. If you selected the option **Every day of the period,** the survey engine will run every day of the month, identify new people who join at any time during the month, and assign the survey to them. But if you selected **Once per period**, the survey engine will run only once, on the 1st of the month, and will assign the survey to new people only the next month.

4. Enter the analysis period. This decides the period for which pulse scores are calculated and displayed as graphs on the employee's Touchpoints page. For example, if the analysis period is 4 weeks, and the employee is assigned a weekly survey, pulse scores are calculated for each week and displayed over the 4-week period. To specify this analysis period, select **4** from the first list, and **Weeks** from the second list.

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

5. Enter the threshold score value. Pulse scores that fall below the threshold value are considered as low scores.

6. Click **Generate** to generate the start and end dates of each period in the selected frequency. These dates are displayed in the Period Summary section. Employees can access the survey any time during each of these periods. If you change the number of occurrences or the survey end dates, you need to click the **Generate** button again to refresh these periods.

   A few points to consider about this section:
   - ○ You can't generate periods for a survey that has the recurrence frequency as **Specific**. In this case, you have to manually enter the start and end dates for each period. To create a survey that runs every alternate day of the week, add the dates for each of these days, with the start and end dates being the same for a given day.
   - ○ For other survey frequencies, you can't assign the survey to employees on any date that's outside of the generated periods. To add such a date, you need to change the frequency type to **Specific** and manually add that date.
   - ○ If you don't want to run the survey on certain dates, say for example weekends or holidays, you can clear the **Active** checkbox next to those dates.
   - ○ You can clear or select the **Active** checkbox next to a period only if its start date is on or after today's date and the survey engine hasn't already run for today's date.

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7. Click **Save**.

What to do next

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

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

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

Notify Employees When a Survey is Assigned

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

To configure these notifications:

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

Assign the Touchpoints Survey

After creating and configuring the Touchpoints survey, the next step is to assign it to the target audience using the Journeys application. The Allocate Scheduled Journey scheduled process runs daily to assign the journey to the target audience.

To assign the survey to employees:

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

Field	Description
When to assign journey?	Assign the journey a few days before the start date of the survey.
Repeat	Select **As per schedule** to assign the survey according to its survey frequency.
Comments	Enter your comments, if any.
Selection Type	Select **Directs** to assign the survey to the direct reports of a line manager. Select **Organization** to assign the survey to all the direct and indirect reports in a line manager's or organizational leader's hierarchy.

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Field	Description
Select a Person	Select the line manager's or organizational leader's name.

6. Click **Assign**. The Activity page appears, displaying the status of the assignment as Pending.

7. Click the **Refresh** button to see when the survey gets assigned to the target audience.

What to do next

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

Related Topics
- Overview of Surveys in Journeys

Define Touchpoints Nudges

Nudges are set up using the Nudge Configuration work area.

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

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

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

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

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

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

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

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

Related Topics
• Overview of Nudges

Configure and Run Scheduled Processes for Touchpoints

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

Name	Description	Recommended Frequency
Process HCM Nudges	Ensures that nudges are triggered on a timely basis	Daily
Aggregate Oracle Touchpoints Data	Aggregates these engagement metrics that are displayed on a manager's Touchpoints Summary page: • Team and organization average interactions • Team and organization average check-ins • Pulse score comparison chart containing averages for direct reports, indirect reports (if applicable), and the organization • Number of check-ins completed and not completed in the current month	Choosing a scheduling frequency is important because this determines how current the metrics are. The period for which averages are displayed in the pulse score comparison chart depends on the survey frequency. These averages are computed only until the survey end date, regardless of the frequency of the scheduled process. For example, you schedule this process to run every day, and you have a monthly survey assigned to your team that completes on the 30th of every month. When you view this chart in July, you will see the same pulse score averages from Jan – June displayed every day. These averages will change only when the July survey is completed. Then, you can see the averages from February to July in August. The team and organization average metrics are running averages and are therefore relative to the time when the scheduled process is run. For example, if you run the process every day, the period for which these metrics are calculated

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Name	Description	Recommended Frequency
		will also change relative to the current date. The same rule applies to the number of check-ins displayed in the pie chart. Therefore, you can schedule the process depending on how frequently you want these metrics to be refreshed and also ensure that it aligns with the survey frequency. For example, if you have daily surveys, schedule the process on a daily basis.

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

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

Related Topics
- What are scheduled processes?

Configure Email Alert Notifications for Touchpoints

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

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

Email Notifications

Event	Recipient	Alert Code
Received thank you note for sending anytime feedback	Employee/Manager	HRT_ANYTIME_FEEDBACK_PROVIDED
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

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

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

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

Configure Notifications Using Alerts Composer

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

Here's how you configure the notifications:

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

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

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

Related Topics

- Overview
- Anytime Feedback Notifications

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.

▶ **Watch video**

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

Understand Your Team Better

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

The term dotted-line reports is used in the context of a matrix manager's reports, while the term indirect reports is used in the context of a higher level manager's reports in the organization hierarchy.

To view the Touchpoints Summary page, go to **My Team** > **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

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- Touchpoints and Performance check-ins that are upcoming and overdue. Check-ins include one-time and recurring Touchpoints check-ins and Performance check-ins.
  - The Upcoming check-ins section displays the earliest check-in that's coming up in the next 30 days. If an employee has two check-ins for two different assignments with the same manager, the earliest of those check-ins is displayed. The same applies to recurring check-ins too.
  - The Overdue check-ins section displays employees who don't have any check-ins scheduled in the past 30 days or in the future 30 days from the current date.
- 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, awards, or recognitions 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. A matrix manager can switch to their dotted-line report's team. If this dotted-line report also happens to be a matrix manager, engagement metrics, pulse scores, and check-in statuses are displayed for that dotted-line report's team as well. A manager can drill down to the furthest level in the matrix or direct line hierarchy. The organization hierarchy is displayed as breadcrumbs on the Switch team panel.

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 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 team of direct and dotted-line reports, if any.
- The pulse score comparison graph for indirect reports appears only if the selected manager has indirect teams reporting to them.
- The pulse score comparison graph displays pulse score averages for the survey selected in the survey switcher. To view the scores, the selected survey must be assigned to your team.
- The period for which pulse score averages are displayed corresponds to the survey frequency and not on the analysis period configured in the survey:
  - If the survey frequency is daily, scores are displayed for the past 7 days from the current date.
  - If the survey frequency is weekly, scores are displayed for the past 6 weeks from the current week.
  - If the survey frequency is monthly, scores are displayed for the past 6 months from the current month.
  - If the survey frequency is yearly, scores are displayed for the past 6 years from the current year.
  - If the survey frequency is set to a specific frequency, scores are displayed for the past 18 periods from the current period.

  > **Note:** The x-axis on the pulse score comparison chart shows the survey end date for each frequency.

- The **Schedule check-in** link in the Overdue check-ins section doesn't appear for indirect managers because they can schedule check-ins only with their direct and dotted-line 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.

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View Your Team Interactions

To view the latest pulse scores and upcoming check-in dates of your direct reports and dotted-line reports, go to **My Team > Touchpoints**. Next, click the **Employees** tab.

The list of employees that appears on the Employees page pertains to the manager who's currently selected on the Summary page. For each employee, these details are displayed:

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

- The latest pulse score of the survey selected on the Summary page. The pulse score is defined and calculated through the scoring option set on the survey questionnaire.

- A 7-day trend next to the score.

You can use the **Switch Team** button on the Employees page to view the employee data for a different manager. 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.

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

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

Interactions with Individual Employees

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

Pulse score chart

You can see the past and current pulse scores for the employee over a period of time, which depends on the survey frequency and analysis period configured in the survey definition. For example, consider the scenarios below:

- If the survey frequency is daily and the analysis period is 2 weeks, scores are displayed for the past 14 days.

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

- If the survey frequency is monthly and the analysis period is 4 months, scores are displayed for the past 4 months.

- If the survey frequency is yearly and the analysis period is for 5 years, scores are displayed for the past 5 years.

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

Note: The x-axis on the pulse score comparison chart shows the survey end date for each frequency.

Events and interactions

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, awards, and recognitions that are received from you and others. This timeline displays data for three months in the past and in the future. This data also includes performance check-ins scheduled using Performance Management.

Recommendations for you

The Recommendations for you panel lists recommended actions or nudges 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

- Recognize the employee's personal milestones such as birthdays and anniversaries and achievements such as completing a goal early

- 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

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

> **Note:** The recommended actions card to recognize employees will display the **Recognize** button instead of the **Celebrate Event** button.

Promote Engagement through Interactions

Schedule a Check-In with Your Employee

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

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 the following types, displayed across tabs:

- **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

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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.

> **Note:** The Insights topic recommendations appear only for direct reports. They aren't available for dotted-line reports.

- **Goals** topics, which include performance goals from active goal plans whose review period end dates fall within the last 18 months. The tab also include active development goals.

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

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

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

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

- Add notes to the topics – Any note that you add to a goal, feedback, or general discussion topic is retained only in that check-in. If you add the same discussion topic to a new check-in, you need to add a new note on that topic. However, notes added to skills and competency discussion topics are carried over to recurring check-ins or other one-time check-ins and appear as progress notes. The progress notes are only carried over from check-ins that are created for the same assignment in the last 12 months.
- Delete the topics that you just added.
- Click the skill chip to rate the skill and view or invite endorsements for the employee on that skill.

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 schedule only one check-in per day with an employee.

Related Topics
- Schedule a Recurring Check-In

Managers – Modify a Check-In

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

Modifying a Touchpoints Check-In

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

- View details for goal and feedback-related discussion topics.

- View questionnaires, if any, and add your responses to the manager's questionnaire.

- View progress notes for skills and competencies and add your progress notes.

- Click a skill chip to mark it as attained, and view endorsements from others on that skill. If it's a skill you've endorsed, you can remove the endorsement.

- Add new discussion topics.

- Edit the title of the custom discussion topics that you added.

- Add notes to all discussion topics or edit the notes that you added.

- Mark completed discussion topics as discussed.

- Delete a discussion topic, only if:
    - You created it.
    - It has notes that only you added.
    - It's not marked as discussed.

- Change the check-in date.

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.

Modifying a Performance Check-In

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

- Changing the check-in date

- Adding or removing custom or recommended discussion topics

- Adding notes to discussion topics

- Marking topics as discussed

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

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Send Feedback

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

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

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

- Everyone

- Managers only

- Managers and employee

- Only me

- Only employee and me

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

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

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

Related Topics
- Anytime Feedback

Recognize and Award Employees

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

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

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

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

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

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You can send awards and recognitions by navigating to **My Team** > **Touchpoints** and selecting an employee from the **Employees** tab and clicking the **Actions**menu. Or, you can click the **Recognize** button, if it appears as a recommended action on the **Recommendations for you** panel.

A line manager can send awards and recognitions to their direct and indirect reports. However, a matrix manager can't send awards or recognitions to their dotted-line reports.

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

- Awards and recognitions sent from the Celebrate application will also reflect in the employee's Events and Interactions timeline. Similarly, any award or recognition sent from Touchpoints will be visible in Celebrate.

- If there are existing Celebration events displayed on the Events and Interactions timeline, they will continue to be displayed until the timeline period is over. You can click them to view the details on the drawer panel.

- To send recognitions or awards from Touchpoints, the requirements are the same as for HCM Celebrate:
    - At least one recognition or award program needs to exist.

    - The recipient of the recognition or award program needs to be eligible to the program.

Related Topics
- Introduction to Oracle Celebrate
- User Roles and Privileges for Touchpoints

Touchpoints for Employees

Touchpoints for Employees

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

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

(▶) **Watch video**

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.

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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 recognitions or awards that you've received. You can also see performance check-ins that are scheduled using Performance Management.

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

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

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

Schedule a Check-In with Your Manager

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

When scheduling a check-in, if you have multiple assignments that report to a single manager, you can select the assignment relevant to the check-in. If you have multiple managers, you can select the manager with whom you want to schedule the check-in. This includes matrix managers 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 from active goal plans whose review period end dates fall within the last 18 months. Also includes any active development goals.
- **Feedback** – Anytime feedback that you've received from your manager or others in the organization and made visible to you.
- **Competencies**, if they're configured in the check-in template. You can select active competencies from your profile and add them to the check-in as discussion topics.
- **Skills**, if they're configured in the check-in template. You can select attained and developing skills from Skills Center as discussion topics.

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

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

- Add notes to the topics – Any note that you add to a goal, feedback, or general discussion topic is retained only in that check-in. If you add the same discussion topic to a new check-in, you need to add a new note on that topic. However, notes added to skills and competency discussion topics are carried over to recurring check-ins or other one-time check-ins and display as progress notes. The progress notes are only carried over from check-ins that are created for the same assignment in the last 12 months.

- Delete the topics that you just added.

- Click the skill chip to rate the skill and view or invite endorsements from others on that skill.

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

Related Topics
- Schedule a Recurring Check-In

Employees - Modify a Check-In

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

Modifying a Touchpoints Check-In

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

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

- View the details for goal and feedback-related discussion topics.
- View questionnaires, if any, and add your responses to the manager's questionnaire.
- View progress notes for skills and competencies and add your progress notes.
- Click a skill chip to mark it as attained and view endorsements from others on that skill.
- Add new discussion topics.
- Edit the title of the custom discussion topics that you added.
- Add notes to all discussion topics or edit the notes that you added.
- Mark completed discussion topics as discussed.
- Delete a discussion topic only if:
  - You created it.
  - It has notes that only you added to it.
  - It's not marked as discussed.
- Change the check-in date.

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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.

Modifying a Performance Check-In

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

- Changing the check-in date

- Adding or removing custom or recommended discussion topics

- Adding notes to discussion topics

- Marking topics as discussed

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

Send Feedback and Recognitions

You can send feedback or recognitions to 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.

Recognitions

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

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

As an employee, you can send a recognition to a manager or a colleague from either Touchpoints or from Oracle Celebrate. Any recognitions that you send from Celebrate appear in Touchpoints and vice-versa. Any recognition that you receive appears on your Events and Interactions timeline. Any recognition that you send won't appear on your timeline.

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

Feedback

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

- Everyone

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- Managers only

- Managers and employee

- Only me

- Only employee and me

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

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

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

Related Topics
- Introduction to Oracle Celebrate
- Anytime Feedback

Other Manager and Employee Tasks

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.

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- 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.

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- 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 checks-ins in the series. You can also add recurring discussion topics. But you can't change the assignment of the employee, when they have multiple assignments.

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.

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Delete a Recurring Series

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

- It has discussion topics that are marked as discussed.

- It has discussion topics with notes added by others.

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

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

Manage Recurring Discussion Topics

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

Add Recurring Discussion Topics

Here are a few points to consider:

- A discussion topic added to the first check-in in a recurring series is automatically added to the rest of the check-ins in that series. This includes your own discussion topics as well as recommended topics related to goals, feedback, skills, competencies, or Insights.

- If you add notes to a discussion topic in the first check-in of a series, those notes aren't carried over to the same discussion topic that might be present in the other check-ins in the series. However, progress notes added to skills and competencies are carried over to other check-ins in the series, wherever those skills and competencies are present in the series.

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

Edit Recurring Discussion Topics

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

- You have the option to carry over those edits to the same recurring discussion topic that might be present in the remaining check-ins.

- If you add a new discussion topic to a check-in, it's not carried over to the remaining check-ins.

- You can add your own discussion topics and goals, feedback, skills, compentencies, or Insights topics from the **Recommended topics** panel to any check-in.

Delete Recurring Discussion Topics

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

- You created the discussion topic.

- It's not already marked as discussed.

- It doesn't contain notes added by others.

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

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