

# Oracle Fusion Cloud Human Resources

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## **Using Volunteering**

25B



Oracle Fusion Cloud Human Resources  
Using Volunteering

25B

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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

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

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Thanks for helping us improve our user assistance!



# 1 My Volunteering

## Overview of Volunteering

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

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

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

Administrators navigate to **My Client Groups > Volunteering** to:

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

### *Related Topics*

- [Volunteering Projects](#)

## Volunteering Projects

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

## Organizations

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

## Duration

The volunteering activity can be a one-time effort like a blood donation camp or it can be recurring event like teaching. You can specify the date, duration, and recurrence based on the scope of the volunteering project.

## Location

Indicate a primary location even though a volunteering project can conduct activities in more than one location. Volunteering projects in close proximity to a volunteer's location appear in the recommended projects list.

## Causes

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

## Benefits

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

## Specifications

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

## Project Lead

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

### *Related Topics*

- [Create a Volunteering Project](#)
- [Add a Volunteering Organization](#)
- [Overview of Volunteering](#)

## Create a Volunteering Project

Employees who register as volunteers and administrators can create new projects and organizations. You can create a new volunteering project from the Projects page specific to your role.

## Before You Start

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

To create a volunteering project:

1. Click **Add Project**.
2. In the Create Project page, select an existing organization or create a new one and enter the project name and description.
3. Give the registration deadline, start date, frequency, and project end date.
4. Specify the maximum and minimum capacity for the project and specify the minimum age for participants.
5. Enter the name and contact details of the person who will coordinate the volunteering activities.
6. Select one or more causes associated to the volunteering project and click **Continue**.
7. Select the location where the volunteering activity will take place and click **Continue**.
8. Browse and select the featured image that you want to add as the cover for the volunteering project and click **Continue**.
9. Specify the benefits provided such as refreshments and project giveaways like T-shirts. Attach any additional information related to the project such as consent form or promotional leaflet.
10. Click **Submit**.

## Add a Volunteering Organization

Every volunteering project must be associated to an organization that's the beneficiary of the volunteering project.

As an employee, use Create Organization to create the organization when you create a volunteering project. As an administrator, you can use Add Organization to create a volunteering organization from the Organizations page.

To create an organization:

1. In the Create Organization page, enter the organization name and Employer Identification Number.
2. Enter the mission statement for the organization.
3. Enter details describing the organization and its objectives.
4. Specify the details of where the organization is located.
5. Enter the contact details of the person who will coordinate the volunteering project.
6. Click **Submit**.

### *Related Topics*

- [Create a Volunteering Project](#)
- [What happens if a volunteering organization doesn't meet EIN compliance?](#)



## 2 Employee Volunteering

### How You Collaborate on a Volunteering Project

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

Examples of collaboration:

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

### Collaborating on Volunteering Projects

Tips for collaborating:

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

#### *Related Topics*

- [Create a Volunteering Project](#)
- [How can I engage and collaborate with other volunteers on a volunteering project as a project lead?](#)

### Register for a Volunteering Project

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

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

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

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

### Registering as Project Lead

When you register for a volunteering project, if the project has project lead position available, then you can opt to be the project lead. If you volunteer as a project lead, you have the additional task of coordinating volunteering activities,

sending email blasts, and distributing T-shirts and certificates. You can cancel your registration any time by withdrawing from the volunteering project or you could withdraw only as project lead but continue as volunteer on the project.

#### *Related Topics*

- [Overview of Volunteering](#)
- [Volunteering Projects](#)
- [What's the difference between the volunteer and project lead roles?](#)
- [What's the difference between upcoming projects and recommended projects?](#)

## How You Share Volunteering Updates in Social Networking Sites

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

### Connect to Social Network

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

## FAQs for Employee Volunteering

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

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

### How can I log hours for my volunteering project?

To log hours, in the My Volunteering page click Volunteering Hours to go to the Volunteering History page.

Then, select your volunteering project and click Enter Hours or add hours to the existing time entered for your project. You can view your volunteering history by year and print a report from the Volunteering History section on the Profile Preferences page.

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

If you don't meet the hours you set in your volunteering goal, the remaining time from your volunteering goal displays in the Volunteering History page.

When you specify the hours for volunteering, you must update time spent on volunteering projects regularly. This helps you keep track of your goal progress.

## What's the difference between the volunteer and project lead roles?

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

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

## Can I delete a volunteering project that I create?

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

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

Use these options to collaborate with other volunteers:

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

## How can I add an image to my volunteering project?

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

To add an image:

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

## Why can't I see the photos I submitted for a completed volunteering project?

Check the status of the submitted photos. If the photo approval setting is enabled for your project then it's possible your administrator hasn't approved the photos. Alternatively, the photos may have been rejected by the administrator for some reason.

## What happens if I don't redeem rewards by the expiration date?

The reward will no longer appear in your Rewards Available section.

## Can I add details of a personal volunteering project?

Yes, you can, provided the project is complete. You can add details of a personal volunteering project in the Completed section on the My Projects page so that it's available in your volunteering history.

# 3 Team Volunteering

## Team Volunteering

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

In team volunteering, the key aspects to consider are:

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

### Member Role

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

### Selecting a Volunteering Project

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

### Setting Team Goal

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

### Tracking Team Progress

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

### Private Team

You can make a volunteering team private on the My Team page and hide the information of team members from people who aren't part of the team. This means that other volunteers can't view members of a private team unless they too are on the team.

## How You Challenge Other Volunteering Teams

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

### Challenging Other Teams

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

### Accepting or Declining a Challenge

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

### Tracking Team Progress

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

#### *Related Topics*

- [Team Volunteering](#)

# 4 Volunteering Administration

## Volunteering Administration Components

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

### Projects

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

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

### Organizations

An organization is an entity that benefits from the volunteering project and its activities. An organization if it's based in the US must have a valid Employer Identification Number (EIN) to validate its status as a nonprofit organization with the IRS database. The EIN isn't mandatory for organizations that are based outside of the US. The following details are mandatory to create an organization:

- A unique name
- Nine-digit EIN number (for US based organizations only)
- Description
- Contact

### Campaigns

A campaign is a group of related volunteering projects. For example, you can create a Global Education campaign by grouping all education related projects. Employees can find a campaign and volunteer for a project of their choice.

### Settings

Configure user agreement details, photo approval, causes, EIN validation schedule, and Oracle CrowdTwist integration.

## Project Feedback

Improve the volunteering experience based on ratings that volunteers provide for project leader, project experience, and organization.

## Newsletters

Create and send volunteering project news and announcements, and campaigns with associated projects using newsletters.

### *Related Topics*

- [How You Configure Settings for Volunteering Features](#)
- [How You Assess Volunteering Projects](#)
- [Volunteering Projects](#)

## Create a Volunteering Campaign

You can create a volunteering campaign by grouping volunteering projects that share a theme and that fall within the campaign dates.

1. On your home page, click **My Client Groups > Volunteering**.
2. Click Campaigns and then click **Add** to create a new campaign.
3. In the Campaign Details section, give the campaign name, description, and start and end details.
4. Click **Continue**.
5. Add volunteering projects that you want to group in this campaign.
6. Click **Submit** when you're done.

You can go back and edit the details of the campaign, if required.

## How You Configure Settings for Volunteering Features

Use the Settings task in the volunteering administration work area to add and update the volunteering features that appear on the employee Volunteering page.

You can also schedule the Employer Identification Number (EIN) validation run from this page to help review organizations submitted for your approval.

## User Agreement

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

## Photo Approval

Administrators need to approve the photos that are submitted for a completed project before they can be displayed on the project details page. You can enable or disable the photo release agreement to make changes to the terms and conditions. If you enable this setting, volunteers need to agree to the terms and conditions before they upload photos.

## Causes

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

## EIN Validation

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

## Rewards

Enable integration with Oracle CrowdTwist to configure reward programs for volunteering projects. After you enable the integration, use Oracle CrowdTwist Control Center to manage the reward program. If a volunteering project has points associated, volunteers who register for it can earn points when they complete the activity. They can then redeem the points for rewards.

### *Related Topics*

- [Volunteering Administration Components](#)

## How You Assess Volunteering Projects

On completing a volunteering project, volunteers can submit a survey to rate the volunteering project.

Volunteers use **Assess Project** to rate completed volunteering projects. As an administrator, you can use **View Results** to see and analyze how a volunteering project has fared. You can also add or modify questions in a survey.

## Create a Volunteering Newsletter

You can create and send newsletters to keep volunteers posted on updates related to a volunteering campaign.

1. On your home page, click **My Client Groups > Volunteering**.
2. Click **Newsletters** and then click **Add** to create a newsletter.
3. Select all volunteers or email lists as recipients for the newsletter and click **Continue**.
4. Add the subject and body for the campaign, format the content, and preview the newsletter. If required, you can edit the details of the newsletter.
5. Click **Submit** when you're done.

### Related Topics

- [Create a Volunteering Campaign](#)
- [Volunteering Administration Components](#)

## How You Generate Notifications for Work Life Cloud Service Applications

Use the Generate Notifications for Work Life Cloud Application process to generate notifications for Work Life Cloud Service applications. The applications include Employee Wellness, Volunteering, and Personal Brand.

By default, the process is scheduled to run every 2 hours but you can change this frequency.

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

| Application    | What the Process Does                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Personal Brand | <ul style="list-style-type: none"> <li>• Analyzes employee and organizational surveys and displays the results.</li> <li>• Analyzes meeting survey results if it's available and sends line managers a notification.</li> <li>• Sends organizational surveys to the whole organization.</li> <li>• Sends organizational surveys to eligibility profile users.</li> <li>• Sends meeting surveys to meeting participants.</li> <li>• Sends a notification to all members in the organization if an organizational survey is deleted by the survey owner.</li> </ul> <p><b>Note:</b><br/>The notifications for organizational surveys are sent only after you run the connector job in Personal Brand Administration.</p> |
| Volunteering   | <ul style="list-style-type: none"> <li>• Updates status of a project based on the approval status, start and end dates.</li> <li>• Determines inactive user accounts or changes and sends notifications.</li> <li>• Deletes volunteering invitations based on the status of the project.</li> <li>• Posts absence hours.</li> <li>• Validates EIN.</li> <li>• Sends reminder notifications to the administrator and project creator on projects and organizations that are pending approval or have been returned for information.</li> </ul>                                                                                                                                                                          |
| Wellness       | <ul style="list-style-type: none"> <li>• Notifies employees about a new corporate wellness task, goal, or competition that's available.</li> <li>• Notifies employees about the start of wellness goals and competitions.</li> <li>• Notifies participants about completion of a wellness competition.</li> <li>• Notifies employees about achievement of corporate and personal wellness goals.</li> <li>• Notifies the employee who challenged and the employee who was challenged about achievement of a personal wellness goal.</li> </ul>                                                                                                                                                                         |

| Application | What the Process Does                                                                                                 |
|-------------|-----------------------------------------------------------------------------------------------------------------------|
|             | <ul style="list-style-type: none"><li>• Notifies employees when they win a competition or a corporate goal.</li></ul> |

## Enable Oracle CrowdTwist Integration

You integrate volunteering with Oracle CloudTwist to configure rewards and points for volunteering projects. Here's how you do the integration.

**Note:** You need to obtain a license from Oracle CrowdTwist.

1. In My Client Groups > Volunteering, click **Settings**.
2. In the Configure Rewards section, click **Edit**.
3. Select **Enable integration** to configure the integration with CrowdTwist.
4. Enter the values for the client ID, Environment, and API key fields that you got from CrowdTwist.
5. Click **Save**.

If the integration is successful, you can use the link that displays and go to the CrowdTwist Control Center to configure points and rewards for volunteering projects.

For more information on Oracle CrowdTwist, see the Oracle CrowdTwist Help Center User Guide.

## How You Synchronize Data Between Oracle CrowdTwist and Volunteering

Use the Synchronize CrowdTwist Data process in the Scheduled Processes work area to synchronize data between Oracle CrowdTwist and Volunteering. Although the frequency is 24 hours, you can schedule the process to run at a frequency that meets your requirements.

Here's what the process does if CrowdTwist integration is enabled:

- Checks for volunteer details and creates their record in CrowdTwist Control Center. The process creates the volunteer's name only if their email address and default address is available.
- Credits reward points every time a volunteer enters hours for a completed volunteering project, if the project has rewards configured.
- Disassociates activities from volunteering projects if activities aren't available or are disabled in CrowdTwist.

## How You Associate Points to Volunteering Projects

After you complete the integration with Oracle CrowdTwist you can configure points and rewards for volunteering activities in Oracle CrowdTwist Control Center.

## Associate CrowdTwist Activity with Volunteering Project

You must create a custom activity with same display name as the volunteering project in CrowdTwist. Then, associate that custom activity to that volunteering project during approval process. Remember, you can associate an activity to only one volunteering project. When the Synchronize CrowdTwist Data job is run, it synchronizes the points from the activity you configured and associates it to the volunteering project. Volunteers see the points when they register for the project. They can earn the points when they enter hours for the project.

## FAQs for Volunteering Administration

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

An organization based in the US requires an EIN when it's submitted for approval. The EIN is then validated and if it's not compliant, Invalid EIN displays next to the organization name.

Even though an organization has Invalid EIN status, administrators can still approve or reject the organization during the approval process.

### Can I edit a volunteering organization after it's approved?

Yes, you can do so using Edit on the Organizations page in My Administration.

As an administrator, you can edit all the details of an approved organization except the organization name and the EIN. You don't need to get these subsequent changes approved through an approval process.

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

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

### Can I approve a volunteering project that I create?

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

## What's a reward category?

A reward category is a way to group rewards in Oracle CrowdTwist. When configuring a reward you need to select the reward category that you created for volunteering.

## What are the reward types I can configure?

These are the reward types you can configure:

- Standard - Physical products such as coffee mugs, t-shirts and so on.
- Download - Digital files that you download such as certificates.
- Sweepstakes - Random drawing cards where a winner is picked.
- Codes - Coupon codes that you can redeem online or in a store.

