Oracle Fusion Cloud Talent Management

How do I create and assign a Touchpoints survey?

FA Latest

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1 Introduction

About this Playbook

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.

Use this playbook to create and configure a Touchpoints survey and assign it to employees.

Assign Roles and Privileges

To access all applicable Touchpoints features, managers and employees must have 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
Admin ORA_PER_HUMAN_RESOURCE_SPECIALIST_JOB	Human Resource Specialist

Nudges

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

Recognitions and Awards

Managers and employees must 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.

Check-In Options

An employee (worker) must have the HRA_MANAGE_CHECK_IN_DOCUMENT_PRIV privilege to create check-ins. Even though an employee may be assigned the role options to create check-ins, they must have this privilege to create one.

Enable Profile Options

The ORA_HRE_ENABLE_TOUCHPOINTS profile option must be enabled to use Touchpoints.

Additionally, 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 enable profile 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**.

2 Create and Assign a Touchpoints Survey

Workflow to 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 a Touchpoints Survey*.
2. Create and configure the survey, which includes:
   a. *Create a Touchpoints Survey Journey*.
   b. *Associate the Questionnaire With the Touchpoints Survey*.
   c. *Configure the Survey Frequency and Other Attributes*.
   d. *Notify Employees When a Survey is Assigned*.
3. *Assign the Touchpoints Survey*.

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 must 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.

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 search for the questionnaire template, **Touchpoints Pulse Survey Template**, and create a questionnaire 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 Visual Builder Studio. 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**.

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.

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 for a number of months after its expiration or completion by the employee or HR specialist.

Field	Description
	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 for a 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.

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. A Touchpoints survey can have only one task.

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.

Field	Description
Task Type	The default is **Survey**. Leave as is.
Questionnaire	Select the questionnaire to be used in the survey.

3. Click **Save and Close**.

Configure the Survey Frequency and Other Attributes

While creating the survey, you specify its recurrence frequency, that is, 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.

1. Click the **Schedule Allocation** tab on the Checklist page.
2. Select the recurrence frequency of the survey in the **Repeat** field. 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.	
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.

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

- Specific frequency

  To create a survey with a custom frequency that's not daily, weekly, or monthly (for instance, a survey every alternate day of the week), select **Specific**.

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.
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 1 to 3 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 **Send notification when checklist is force completed** checkbox.

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

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.
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.

Related Topics

- Overview of Surveys in Journeys