Oracle Fusion Cloud Talent Management

How can employees use Touchpoints?

FA Latest

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Contents

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1 How can employees use Touchpoints?

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.

As an employee, use Touchpoints to build strong relationships with your manager and enable your management team to address your needs and concerns.

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
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**.

Touchpoints for Employees

Touchpoints for Employees

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

Watch video

See the rest of this playbook for more information on these tasks.

Understand Your Engagement

On your Touchpoints page (accessible from **Me** > **Touchpoints**), you can review your current and past pulse scores for pulse surveys that you've taken.

Pulse Survey Chart

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

If there are multiple surveys assigned to you, you can right-click the pulse survey chart and select another survey. This will refresh the pulse survey chart with the selected survey's data.

You can show or hide this chart using a page property in Oracle Visual Builder Studio.

Events and Interactions

On your Touchpoints page, you can also view a timeline of events and interactions with your manager and others in the organization.

The timeline displays data for a maximum of 12 months in the past and 6 months in the future. You can also view them as a list, by clicking the list view icon.

Interactions include 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.

You can sort the list view by the type of interaction, in alphabetical order or the date of the interaction. By default, the list is sorted based on the type of interaction, from A to Z.

> **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.

Recommendations For You

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 anyone in the organization

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.

This panel can be shown or hidden using a page property in Oracle Visual Builder Studio.

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 and indirect managers.

> **Note:** While selecting a manager, the list of managers is controlled by the values specified in the ORA_HRA_MANAGER_LEVELS profile option.

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 topic suggestions to add to the check-in, click the **Suggested Topics** button. These topics are personalized suggestions that are displayed in the following tabs:

- **Suggestions –** AI-based personalized discussion topics, followed by nudge-based topics, and any open topics that weren't marked as discussed in previous check-ins. You can add these open topics to the current check-in. Note that you can’t transfer questionnaires and feedback topics from previous check-ins, even if they weren't marked as discussed.
- **Goals –** Performance goals from active goal plans whose review period end dates fall within the last 18 months. Also includes any active development goals. Goals with no target completion dates are displayed first, followed by goals with target completion dates in descending order.
- **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 talent 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.

> **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, depending on the template configuration.

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

- Add notes to the topics.
- 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.
- Create a meeting invite. The ICS file will be automatically downloaded after you schedule the check-in, which you can then add to your calendar.
- Edit a performance or development goal after you add it to a check-in from the **Goals** tab. After you edit the goal, it'll be sent for approval according to predefined approval rules. Note that you can’t edit a goal when it’s in a pending approval status.

Note:

- Notes added to a discussion topic are visible in other check-ins, if that discussion topic is added to those check-ins. These notes are also called as progress notes. To view them, expand a discussion topic on the check-in page, and click **View goal details** for a goal topic, **View progress notes** for a skill or general discussion topic, and **View competency details** for a competency topic. The progress notes for skills and competencies are carried over only from check-ins that are created for the same assignment in the last 12 months.

  After you add an open discussion topic from a previous check-in, you can view progress notes for that topic, if notes were previously added to it. This applies to a goal, skill, competency, or general discussion topic.
- You can schedule only one check-in per day with your manager.

Related Topics

- Schedule a Recurring Check-In
- Check-In Documents

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 progress notes and other details for goal-related discussion topics and add your progress notes.
- 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.
- View feedback comments.
- 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.

- Update the meeting invite details, if check-in includes an invite. To do this, you need to open the check-in and click the **Meeting invite** link.

Note:
- You can add nudge-based 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 anyone in the organization 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**.

You can send recognitions from either Touchpoints or Celebrate. Recognitions that you send from one of these applications is visible in the other. Recognitions that you receive are displayed on your Events and Interactions timeline, but the recognitions that you send to others aren't displayed.

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
- 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

- Anytime Feedback
- Introduction to Oracle Celebrate

Other Tasks

Suggested Actions After a Check-In Discussion

GenAI-powered performance and development goals are now suggested as an outcome of check-in discussion.

The goals are relevant to the employee's job title, department, role description, role responsibilities, check-in details, and existing goals.

When you click the **Suggested Actions** button on a check-in page, three goals are displayed. You can then add them as follow-up actions after the check-in discussion is completed.

Request Feedback Using Touchpoints

As an employee, you can now request feedback from your manager or peers using Touchpoints. As a manager, you can request others in the organization to give feedback about your team members.

You can request two types of feedback: general feedback or feedback on performance goals.

- To request feedback for yourself, go to your Touchpoints page and select **Request Feedback** from the **Actions** menu.
- To request feedback for a team member, click the **Employees** tab on the Touchpoints Summary page. From the **Actions** menu next to an employee, select **Request Feedback**.

To request feedback, these feedback templates must exist in the Feedback Templates section in Performance Management:

- For general feedback, you can have one or more active general feedback templates.
- For feedback on goals, you must have one active performance goal feedback template.

A few points to note:

- You can request feedback from your manager, direct peers, or anyone in the organization. You can request feedback from multiple employees as part of the same feedback request.
- You can choose as many performance goals as you want to request feedback on.
- For general feedback, you can select the questionnaire that you want to attach to the request, if more than one general feedback template exists. For feedback on goals, questions from the most recent performance goal feedback template are automatically included in the request.
- You can add your own questions to the questionnaire, if the questionnaire template supports additional questions. When requesting feedback on goals, all questions are repeated for each performance goal in the request sent to the feedback provider.
- When employees request feedback, they can choose to share the received feedback with their manager or with themselves. When a manager requests feedback for an employee, they can choose to share the received feedback with the employee.
- You can specify a due date for completing the feedback and add an optional message to the feedback provider.

After an employee has received feedback, they can view it in the **Events and interactions** timeline on their Touchpoints page. Managers can view the feedback received by their employees in the **Events and interactions** timeline on the employee's Touchpoints page. However, the feedback appears in the timeline only if it's shared with the manager.

As a manager or employee, you can view and add the received feedback as a discussion topic to a check-in agenda. To do this, click the **Feedback** tab on the **Recommended topics** panel of the check-in page. To view the complete feedback, click the **View more** link on this tab.

Average Team Interaction Analytics

Any feedback that an employee or manager has requested is added to the **Average Team Interactions** analytics displayed on the manager's Touchpoints Summary page. This includes feedback requested on goals as well.

Notifications

The feedback provider receives a notification in these scenarios:

- A manager or employee requests feedback from them.
- The due date for providing requested feedback nears.
- A manager or employee thanks them for their feedback.

The feedback provider receives a separate notification for each performance goal included as part of the request.

The person who requests feedback receives a notification when the feedback is completed or revised. The manager also receives a notification about completed or revised feedback, if the feedback is shared with them.

Related Topics

- Requested Feedback
- How can I create a feedback template for performance goals?

Schedule a Recurring Check-In

As a manager or an employee, you can schedule recurring check-ins in Touchpoints according to the frequency of your choice. You can also add recurring discussion topics to these check-ins, as required.

You can schedule recurring check-ins on a daily, weekly, monthly, or yearly basis.

Here's some info regarding each scheduling frequency:

- Daily recurrence: You can end the daily recurrence by specifying an end date or the number of recurrences. For example, if you specify the number of recurrences as 7, check-ins are scheduled every day for 7 days, starting from the first check-in date.
- Weekly recurrence: You can end the weekly recurrence by specifying an end date or the number of recurrences. For example, if you specify the number of recurrences as 4, check-ins are scheduled weekly once for 4 weeks, starting from the first check-in date.
- Monthly recurrence: You can choose to repeat the check-ins on a specific date or day of the month. For example, schedule a check-in on the 21st of every month or every second Monday of every month. You can end the monthly recurrence by specifying an end date or the number of recurrences.
- Yearly recurrence: Select the month when you want to schedule the first check-in, and then repeat the check-in on a specific date or day of that month. For example, schedule the first check-in on January 2 each year, or every first Monday of January each year. You can end the yearly recurrence by specifying an end date or the number of recurrences.

If an employee has multiple assignments, a manager can select the assignment relevant to the check-in.

As an employee, if you have multiple assignments that report to a single manager, you can select the assignment relevant to the check-in. If you have multiple managers, you can select the manager with whom you want to schedule the check-in. This includes matrix managers as well.

As an employee, you can view recurring check-ins in the **Events and interactions** timeline on your Touchpoints page.

As a manager, you can view recurring check-ins in the **Events and interactions** timeline on the Touchpoints page of the employee that you select.

> **Note:** When you schedule recurring check-ins, ensure that the dates of the check-ins don't conflict with already scheduled check-ins. If they conflict, and you proceed to create the recurring series, the conflicting check-ins aren't created as part of this series. However, the other check-ins that don't conflict are created in the series, and they appear in the **Events and interactions** timeline.When you schedule a recurring check-in, you can create a meeting invite. The ICS file will be automatically downloaded after you schedule the check-in, which you can then add to your calendar. The manager and employee receive a notification when a recurring 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.

If your recurring check-in has a meeting invite, and you want to change the meeting invite details, you can choose to update the meeting invites in all the future check-ins, or make the update only in the current check-in.

When you change the frequency of a recurring check-in, meeting invites, if any, will get automatically updated and downloaded.

You can modify the series only if:

- You created it.
- The check-ins don't contain discussion topics that are marked as discussed.
- The check-ins don't contain notes added by others.

Delete a Recurring Series

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

- It has discussion topics that are marked as discussed.
- It has discussion topics with notes added by others.

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

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

Manage Recurring Discussion Topics

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

Add Recurring Discussion Topics

Here are a few points to consider:

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