Talent Management

How do I set up Touchpoints?

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Author: Ramasubramanian Balasundaram

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1 How do I set up Touchpoints?

Introduction

About this Playbook

Use this playbook to learn to set up Oracle Fusion Cloud Touchpoints. Oracle Fusion Cloud Touchpoints, hereinafter referred as 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.

Manager can:

- Understand the level of interaction in your team in terms of check-ins scheduled, awards and recognitions sent to employees, and feedback given to them.
- 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.
- Add agenda topics of your choice to these meetings. You can choose from personalized discussion topics recommended by Generative AI that are geared toward an employee’s career development. You can also choose to add skill, goal, or competency-based discussion topics. You might also see discussion topics generated by nudges, such as overdue or pending check-ins, low employee sentiment from a recent pulse survey, or gaps in an employee’s work progress, which you can add to the check-in.
- Recognize and award employees for their achievements or important milestones.
- Provide timely feedback and also request feedback from others.
- View past and upcoming events and interactions with employees for 12 months in the past and 6 months into the future.

Employee 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.

- Schedule recurring check-in meetings with your manager. You can add your own topics of discussion to these meetings. You can also add general topics recommended by generative AI or add other topics that are related to your development and performance goals, skills, competencies, or feedback that you've received.
- 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.
- Recognize your colleagues to appreciate their achievements.

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**.

Configure a Touchpoints Check-In Template

Introduction to Touchpoints Template

Before you can schedule a Touchpoints check-in, you need to configure a Touchpoints check-in template using Performance Management and set it to active.

Some points to consider when configuring a check-in template:

- You can associate a performance review period with a check-in template. So choose an appropriate review period option from the **Review Periods** list.
- Click Eligibility Profile to make the template available to specific employees who meet the criteria.
- 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 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.

> **Note:** Any changes made to a check-in template after it's created doesn't impact check-ins that were created from it. The changes made will apply only to new check-ins created going forward.

How do I configure a touchpoints check-in template?

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

1. Go to **My Client Groups** > **Performance**, scroll to the Setup Maintenance section and click **Check-In Templates**.
2. Click **Add** to create a new check-in template or search for an existing template.
3. Select the specific performance review periods from the **Review Periods** list to associate with the template. You can choose the **All Review Periods** or **Specific Review Periods** options. The **Select Review Periods** list list appears if you choose a specific review period. See *Review Periods in Talent Management*.

   > **Note:** Dissociating a check-in template from a review period does not impact employees' existing check-in documents.

4. Select an appropriate choice as active or inactive for the status of the template in the **Status** list.

   > **Note:** You can specify or change review periods for an inactive check-in template. These review periods will become effective when the template is activated later.

5. Choose appropriate talent profile, position profile, and job profile competencies as discussion topics.
6. Click **Add Row** in the Eligibility Profile section to make the template available to eligible employees who meet one or more eligibility criteria.
7. Click the check box to make an eligibility profile required among the set of eligibility profiles you've selected.

   > **Note:** Ensure you schedule the eligibility batch process to assign check-in templates to eligible profiles.

8. Click **Submit**.

   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.

What to do next

You must run the eligibility batch process to determine eligible workers for check-in documents using eligibility profiles. To do so, use the Eligibility Batch Process task in the Setup Maintenance work area. See *Run the Eligibility Batch Process*.

Related Topics

- How do I enable a profile option?

How do I enable touchpoints check-in options?

Specify check-in options so that managers and employees can create, delete, and set check-ins as read-only or editable.

1. Go to **My Client Groups** > **Performance**, scroll to the Setup Maintenance section and click **Check-In Templates**.
2. Click **Add** to create a new check-in template or search for an existing template.
3. Select one or more options for a manager and employee in the Role Actions section as shown in this table.

Role Options	Description
Create Check-In	Employees or managers can create a check-in using this template.
Delete Check-In	Employees or managers can delete a check-in based on this template, but only the person who created the check-in can do so.
Make Check-In Read Only	Employees or managers can close check-ins based on this template.
Make Check-In Editable	Employees or managers can make a check-in editable again by reopening it.

4. Click **Submit**.

Related Topics

- How do I configure a touchpoints check-in template?
- How do I enable a profile option?

Define Nudges

Set Up Nudges

Use the Nudge Configuration work area to set up nudges for Touchpoints.

Nudges are triggered and sent to the recipient when the criteria defined in the nudge configuration is met. This table lists the scenarios in which nudges appear in Touchpoints. This table also lists the recommended frequency of the scheduled process.

> **Note:** After configuring nudges, ensure that you run the Process HCM Nudges scheduled process, which triggers the nudges and delivers them to the configured channels.

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 to an employee for a period of time.	The nudge appears when a manager hasn't provided feedback for a specific number of days. This number is configured by the Administrator.	Manager	Touchpoints card, check-in insights, email	Bi-monthly or monthly
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.	Employee, Manager	Touchpoints card, email	Bi-monthly or monthly

Module	Scenario	Criteria	Recipient	Nudge Channel	Recommended Run Frequency
		This number is configured by the Administrator.			
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
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	Manager	Touchpoints card, check-in insights, email	Monthly

Module	Scenario	Criteria	Recipient	Nudge Channel	Recommended Run Frequency
		target completion date. This number is configured by the Administrator.			
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. This number is configured by the Administrator.	Employee, Manager	Touchpoints card, check-in insights, email, journeys	Monthly
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.	Employee	Touchpoints card, check-in insights, email, journeys	Quarterly

Module	Scenario	Criteria	Recipient	Nudge Channel	Recommended Run Frequency
		This number is configured by the Administrator.			
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	Touchpoints card, email	Depends on the survey frequency
			Manager	Touchpoints card, check-in insights, email	

Configure Nudges in Touchpoints

Here's an example of configuring nudges in Touchpoints for an employee aligned with a high priority 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 a 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 to trigger the nudge.
8. Click **Add** in the Channels section.
9. Select **Email**, **Touchpoints card**, or **Check-in insight** channel type.
10. Select the **Active** checkbox.
11. Select the recipient of the channel type.
12. On the **Content Source** list, you can:
    - Select the default content available for the channel.
    - Select **User-defined Content** to create a channel of your choice.

    If you chose **User-defined Content**, you must enter your custom text for the channel. For example, for the **Email** channel type, you must specify a title and a message.

13. Click **OK**.

Configure and Run Scheduled Processes

Scheduled processes are available for specific business needs in Touchpoints.

You run 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	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 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.

Configure Notifications

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
Manager scheduled a check-in	Employee	HRA_TP_CHECK_IN_DOC_CREATED
Employee scheduled check-in	Manager	HRA_TP_CHECK_IN_DOC_CREATED
Manager deleted a check-in	Employee	HRA_TP_CHECK_IN_DOC_DELETED
Employee deleted a check-in	Manager	HRA_TP_CHECK_IN_DOC_DELETED
Manager deleted a check-in discussion topic (feedback, performance and development goals, and Insights topics)	Employee	HRA_TP_CHECK_IN_DISCUSSION_TOPIC_DELETED
Employee deleted a check-in discussion topic (feedback, performance and development goals, and Insights topics)	Manager	HRA_TP_CHECK_IN_DISCUSSION_TOPIC_DELETED
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.

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. Select **Manage Recipients and Message** from the **Edit** menu to edit the contents of the email template.

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

Configure the Touchpoints Appearance

Touchpoints is built using Visual Builder Cloud Service (VBCS). Hence, the branding, logo, theme, and color scheme of the VBCS-based pages could be different from other 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 pulse score graph on the Employees page.