Oracle Fusion Cloud Talent Management

Using Goal Management

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1 **Overview of Goal Management**

Overview of Goal Management

The Goals work area enables workers, managers, and organization owners to define and set goals that support the common objectives of an organization.

Workers can update goals throughout a goal setting and tracking cycle, and managers and organization owners can track the goals as workers progress through them.

The Goals work area supports these entities:

- Specific, measurable, achievable, relevant, and time-based (SMART) goals
- Goal plans
- Goal plan sets
- Review periods

> **Note:** Availability of these features of goal management depends on application settings defined by your organization.

SMART Goals

Use performance goals that are specific, measurable, achievable, relevant, and time-based (SMART) to measure the performance of workers, help them improve productivity, and achieve career objectives. Performance goals are results-oriented, measure work-related performance, and often use specific targets to assess the level of workers' achievement. For example, the performance goals can specify how workers measure achievement of objectives and include target dates.

Use performance goals in performance documents as part of the evaluation process. Workers and managers can create performance goals. HR specialists can create organization goals. Organization goals are performance goals that you create, or those from the goal library, to set the business direction and targets for your organization. Managers who are also organization owners can add existing performance goals as organization goals. They can then assign them to any level of the manager assignment hierarchy to support the organization's overall business objectives. Workers' can align their own goals to the organization goals to achieve the same objective.

Depending on your application settings, your role, and security privileges, you can add tasks and target out comes to your goal. Tasks are specific actions you add to a goal that a worker undertakes to achieve the goal. Goal tasks have various types, including mentoring, researching, and coaching. Target outcomes enable the linking of a goal to specific skills or qualifications such as competencies, languages, and licenses and certifications. Use target outcomes to increase a worker's proficiency for current or future job requirements, or to add to the worker's set of skills.

Workers can mark the performance goals that they create and not linked to any performance documents as private. Private performance goals aren't visible to others, including managers.

Goal Plans

Goal plans are used to manage a collection of performance goals for a specific period. You can roll out goal plans to individuals, a selected hierarchy, or a wider population within the organization. You can add goals for a worker only

when the worker is assigned goal plans. You must associate each goal with a goal plan. Therefore, to add goals to a worker, you must ensure that goal plans are already assigned to the worker. You can associate a worker goal only with one goal plan at a time. Each goal plan is associated with a review period.

Goal Plan Sets

Goal plan sets are used to group and assign performance goal plans to a population set. Each goal plan set is associated with a review period.

Review Periods

Review periods enable you to organize your processes around goal management and performance evaluations into time-bound business cycles. Review period is a common component that ties to goal plans and performance document periods. For example, you create review periods to associate with goal plans and performance documents that fall within the same time frame.

Deep Links

You can use deep links to navigate directly to the Goal Management pages indicated in this table.

Deep Link	Navigates To
Manage Goals	Manager's Goals page that shows the direct and indirect reports
My Goals	Employee Goals page

Related Topics

- How Performance Documents Work with Performance Goals
- How Goal Management Works with Profiles
- Goal Plans
- Goal Plan Sets

Performance Goal Measurements

Goal measurements help to assess the level of success of achieving the performance goal.

Workers can add measurements to their own performance goals. Managers can add and assign measurements to goals of their team members. Your administrators can use the **Use Goal Measurements** profile option to determine if users can add only a single measurement or multiple measurements to a goal.

You define and view a measurement for a goal in the Measurement section. If you select a unit of measure (UOM), you can include optional data for the measurement, such as target type, target value, and actual value.

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Single Measurements for Goals

When the **Use Goal Measurements** profile option's value is set to **Single**, users can select and define only a single measurement for a goal.

Multiple Measurements for Goals

When the **Use Goal Measurements** profile option's value is set to **Multiple**, users can define and view multiple measurements for a goal.

Calculation Rules for Multiple Measurements

Select a calculation rule when multiple measurements have the same UOM on the add or edit goal pages. The calculation rule you select is used to determine the overall target and actual values for a goal. The options are:

- **Average**: The average of the actual and target values is the overall actual and target values for a goal.
- **Sum**: The sum of the actual and target values is the overall actual and target values for a goal.

Related Topics
- Overview of Goal Management

FAQs for Overview of Goal Managenment

What's a key performance goal field?

Configure a key goal field for performance goals to require manager approval when edited.

The key performance goal fields are:
- **Goal Name**
- **Description**
- **Success Criteria**
- **Start Date**
- **Target Completion Date**
- **Priority**
- **Category**
- **Weight**
- **Measurement Name**
- **Unit of Measure**
- **Target Type**
- **Target Value**
- **Private**

What's a target outcome?

Target outcomes are specific skills, competencies, or certifications added to a goal that can be achieved or acquired by the successful completion of the goal.

Target outcomes help workers improve their proficiency at their current jobs or develop additional qualifications to prepare them for future jobs. The availability of target outcomes for addition to goals depends on the content section access settings for your role.

Why can't I view the goal details for some employees who I select?

When you search for people on goal pages, you can see all employees in the organization. But the details you see for those people depend on your security privileges.

Line managers and human resource specialists can access more detailed information about their team members and people for whom they're responsible respectively.

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2 Review Periods

Review Periods in Talent Management

Review periods are business periods that you use to measure performance and achieve results. Review periods enable you to organize your processes into time bound business cycles. For example, you can create a review period for the Financial Year 2020 as FY2020.

You can link Talent Management business objects that have the same review period time line. Review period is a common component that ties to goal plans and performance document periods. For example, you can connect an employee's performance to business objectives and results by associating goal plans in the Goals work area and performance documents in the Performance Management work area with business periods using review periods.

Manage Review Periods

As an HR specialist or administrator, you manage review periods on the Review Periods page.

- HR specialists can go to **My Client Groups** > **Goals**, and then select the **Review Periods** link.
- HR specialists can go to **My Client Groups** > **Performance**, and then select the **Review Periods** link.
- Administrators can search for and use the **Review Periods** task in the Setup and Maintenance area.

These considerations apply for review periods:

- You can create review periods whenever you want to, and later associate them with goal plans, goal plan sets (if enabled), and performance documents.
- Each review period must have a unique name.
- If a review period is in use, then you can't modify its start and end dates.
- You can set the status of a review period to active or inactive any time. The business objects already associated with a review period that you make inactive continue to use the review period. But HR specialists can't see an inactive review period when creating a business object, such as a goal plan, goal plan set, or performance document.
- You can hide inactive review periods in all employees and managers responsive pages. You need to set the **Display Inactive Review Periods** (ORA_HRT_DISPLAY_INACTIVE_REVIEW_PERIODS) profile option to **No**. But remember that HR specialists will continue to see inactive review periods regardless of the profile option value.
- You can also delete review periods that aren't in use.

Review Periods You See

You can now only see relevant review periods on the Goal Management and Performance Management responsive pages.

- On the employee **Goals** spotlight page, you can see only those review periods for which the employee has an assigned goal plan. But if primary goal plan is enabled, you can see all review periods.

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- On the employee **Performance** Spotlight page, you can see only these review periods:

  - Review periods where the employee has a performance document created for them or an Anytime document can be created
  - Review periods where the employee has a check-in document created for them or a check-in document can be created

- On the **Performance** spotlight page, an employee can also see review periods where the employee has a received a request to provide participant feedback for another employee.

- On the Evaluate Performance page, managers can see review periods for which there are created employee performance documents (regular or Anytime) where the manager is the performance document manager.

- On the Goals and Performance Overview page, managers can see only these review periods:

  - Review periods where the employee has an assigned goal plan. But if primary goal plan is enabled, all review periods are shown.
  - Review periods where the employee has a performance document created for them or an Anytime Document can be created
  - Review periods where the employee has a check-in document created for them or a check-in document can be created

Link Goal Plans and Goal Plan Sets to Performance Documents

When you create performance templates, you select a review period for each document period.

When you create a goal plan, you select a review period and then associate performance document types with the goal plan. If goal plan set is enabled, when you create a goal plan set, you select a review period. All goal plans in the goal plan set have the same review period. The goal plan's review period and the associated performance document types determine the goals that appear in the goal plan when a performance document is created.

Associate Check-In Templates with Review Periods

You can associate a check-in template with specific performance review periods or all review periods. By default, check-in templates are associated with all review periods. When you create a check-in document based on the template, these goals for the review period are included in the check-in document:

- Performance goals that aren't pending approval, not private, and not canceled

- Active and not private development goals

You can add a discussion topic for a performance goal if you're assigned any goals for the review period.

> **Note:** When you change the review periods associated with a check-in template, the already created check-in documents aren't affected.

Did you know that you can also specify review periods or change review periods for inactive check-in templates? The review periods can control the goals included in the check-in documents, when you later activate the template.

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Related Topics

- Goal Plans
- Goal Plan Sets
- How Performance Documents Work with Performance Goals
- Guidelines for Setting Up Performance Document Periods
- Create a Check-In Template

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3 Manage Team Goals

How You Manage Performance Goals for Your Team Members

You can manage performance goals for your team members and assign goals to them.

To add performance goals as a manager, use the Goals and Performance Overview page. Go to **My Team** > **Performance Overview**.

You can also manage goals for a worker from the Goals tab in the worker's person spotlight, if available to your role.

Depending on your role and security privileges, you can add worker goals using goal plans, the mass assignment request, and data loaders.

As a manager, you can do these tasks:

- Assign a performance goal to your team member's goal plan within a review period.
- Add target outcomes, if enabled, to goals and automatically update the person profiles of your reports.
- Add and update tasks to provide specific actions that determine how your reports can achieve their goals.
- Add notes to your team member's goals and delete notes you added.
- Align the goals of your reports to other goals.
- Approve goals submitted by direct reports.
- Cancel or delete goals for your reports.

  Note: You can't delete goals that you assigned to your team members if they have added any note to the goal. You can cancel or delete goals assigned by HR specialists if this has been enabled in the goal plan. When you cancel or delete a goal assigned by an HR specialist, both the HR specialist and the employee whose goal was canceled or deleted receive notifications if the appropriate notifications have been enabled.

- Share your performance goals with your team members or others.
- Copy a goal for a report and change the goal plan and attributes of the new copied goal as appropriate. The copied goal is added to the report's goals list.
- Move a goal to another goal plan. The goal that's moved is no longer associated with the source goal plan.
- Extend a goal to another goal plan to let the worker continue working on the goal for a period later than the current goal plan. The target goal plan must have an end date later than the end date of the current goal plan. After extending, the goal is associated with both the source and target goal plans. Any subsequent changes to the goal in the source goal plan are also carried onto the target goal plan after you extend the goal.
- Track measurements added to goals for your reports.

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How You Make Performance Goals Available to Workers

HR specialists and managers, if allowed, can assign goals to workers so that they can adapt the assigned goals to their particular requirements.

Managers can allocate goals to workers in these ways:

- Add goals to the workers from the Goals tab in the worker's person spotlight.
- Add goals to the selected workers on the Goals and Performance Overview page.
- Mark a goal as a goal that can be shared with the organization while adding or editing a goal on the Goals page of the manager.
- Share goals with workers and colleagues on the manager's Goals page.
- Add goals in the Performance Goals section of a worker's performance document or import another worker's goals to the performance document of a worker.

HR specialists can allocate goals to workers in these ways:

- Add goals in the Goals section while creating or editing a mass assignment process.
- Add goals in the Goals section while creating or editing a goal plan.
- Add a performance goal while conducting a talent review meeting.

Assign Goals to Workers

This table describes methods that different roles use to assign goals to workers.

Role	Description
Managers	Managers can assign their own goals, add new ones, or use existing goals from the goal library. They can assign goals to all their direct reports or a specific direct report. When a primary goal plan is active, managers can also assign goals to people who don't directly report to them. When managers assign their own goals to workers, the workers' goals are aligned automatically to the manager's goal. Managers can cascade goals using goal assignment. Senior managers can assign their goal to other managers who report to them. The line managers can in turn assign the goals to their direct reports. They can assign the goals exactly as they're, or change them to fit the population to which they're assigning the goals.
HR specialists	HR specialists can assign goals to workers by creating a goal plan associated with a review period for a specific population and adding goals to the plan. The HR specialist can add goals directly to the plan either before or after creating it. Depending upon the goal plan settings, HR specialists can add additional goals to the plan.

Role	Description
	Note: If you have an active primary goal plan, all goals are assigned to the primary goal plan of the selected review period and worker job assignment. HR specialists can use mass assignment requests, application-generated spreadsheets, and other tools such as data loaders to assign goals to workers.

Share Goals with Organization

Goal administrators or organization owners can share their goals and make them available for workers in their hierarchy. These goals are labeled as Organization Goal in the Goals page. The people who report to the person sharing the goal can see these goals in the Organization Goals subsection of the Goals Shared with Me section of their goal page. They can add these organization goals as their own goals.

Share Goals with Others

Managers can share goals with their direct and indirect reports as an alternative to assigning goals. Workers can share goals with their colleagues. Workers can also align their goals to the shared goals of either a manager or a colleague. A goal that a worker adds from shared goals is automatically aligned to the shared original goal.

Related Topics

- How You Share Performance Goals
- Performance Goals Alignment
- How Performance Documents Work with Performance Goals
- Person Spotlight

Request Feedback for Your Team Member's Performance Goals

As a manager, you might want feedback from other people who have worked with your team members regarding their performance goals.

For example, a team member might have worked on a short-term project with another project manager and you might want the project manager's feedback regarding the team member's performance.

Before You Request Feedback

You can request feedback only if these criteria are met:

- An active performance goal feedback template exists.
- Your administrator has enabled these features for performance goals:
  - Drill-down mode

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               o   Feedback requests in Transaction Design Studio

- You must be able to update the performance goal.

Request Feedback

To request feedback for a performance goal of your team member:

1. Go to the Goals page of the person.
2. Select the goal plan that has the goals for which you want to request feedback.
3. Select the goals for which you want to request feedback.
4. Select the **Request Feedback** action.
5. Specify these details on the Request Feedback page:
   - People whose feedback you want. You can also choose to share the feedback with the team member you're requesting the feedback for.

     > **Tip:** Did you know that you can select any or all of your team member's peers or direct reports when requesting feedback? If your administrator has enabled this feature, you can see the **Select Peers** and **Select Direct Reports** buttons to do this.

   - Additional questions apart from those on the standard performance goal feedback template.

   - The date by when you need the feedback.

   - Optional message for the people you're requesting feedback from.

   > **Note:** The due date for the feedback and the message sent is the same for all the selected goals.

6. Click **Submit**.

The people whose feedback you requested are notified when the feedback request is sent.

How You Provide Feedback for Performance Goals

Feedback is an important part of the performance goals workflow. It helps employees improve their individual performance and achieve organizational objectives.

Employees and their managers can request feedback for the employee's performance goals. You get a notification when anyone in your organization requests your feedback. The notification lists the goals for which you need to provide feedback and the due date.

Provide Feedback

You can provide feedback in these ways:

- Use the notification that you receive.

- Check feedback requests on your Feedback page.

To provide feedback using the notification that you receive:

1. Open the notification that lists the goals for which you need to provide feedback.

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2. Click **Provide Feedback**.
3. You see the feedback requests in the Feedback Requests About Others section of your Feedback page with these details:

   - Due date for the feedback
   - Who requested the feedback and when
   - Goal name

4. Click the feedback link.
5. On the Performance Goal Feedback page, provide your feedback and click **Submit**.

To provide feedback by checking the feedback requests on your Feedback page:

1. Go to **Me** > **Career and Performance** > **Feedback**.
2. Expand the Feedback Requests About Others section.
3. You can identify the new requests by their **New** status. Click the feedback link.
4. On the Performance Goal Feedback page, provide your feedback and click **Submit**.

Revise Feedback

You may sometimes get requests to revise the feedback you provided for a performance goal. The administrator or HR specialist of an employee may want more details regarding the employee's performance.

You can revise feedback in these ways:

- Use the notification that you receive.
- Check feedback that you have given on your Feedback page.

To revise feedback provided for performance goals using the notification that you receive:

1. Open the notification about the feedback revision request.
2. View the request details.
3. Click **Revise Feedback**.
4. Update the feedback given and click **Submit**.

To revise feedback that you have given from your Feedback page:

1. Go to **Me** > **Career and Performance** > **Feedback**.
2. Expand the Feedback Requests About Others section.
3. The status of the completed feedback requests that you have been asked to revise is now **In Progress**. Click the feedback link.
4. On the Performance Goal Feedback page, revise your feedback and click **Submit**.

Related Topics
- View and Act On Notifications

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FAQs for Manage Team Goals

Why do my direct reports have performance goals assigned to them before I have added or assigned any?

Performance goals might have been assigned by the organization owner or HR specialist before you assigned any goals. Goals might also be present because the workers created the goals themselves, or copied the goals from shared or organization goals.

The HR specialist can assign goals when creating or editing a goal plan.

What happens if I assign my performance goal to a worker?

A copy of the performance goal is added to the worker's list of goals and is associated with the worker goal plan. Your own goal remains in your list and isn't changed.

Workers can begin working on the assigned goal. If you select the option to allow workers to update the goal, they can edit key fields, such as goal name and success criteria. You assign a goal from your Goals page. Go to **Me** > **Career and Performance** > **Goals**.

As a manager, can I see all feedback requests that my team members have raised for their performance goals?

Even if you're a manager, you can't see all feedback requests of performance goals of your team members.

- You can see only the feedback requests that your team members have shared with you.
- You can't see the feedback requests raised for private goals.
- When assignment level security is enabled, you can see only the requested feedback that has been shared with you on goals for assignments that you can access.

Can I edit a feedback that I have submitted?

No. You can't edit a submitted feedback until an HR specialist requests you to revise the feedback submitted.

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As a manager, can I delete feedback given for an employee's performance goal?

No. You need the Administer Requested Feedback aggregate privilege to delete feedback requests of performance goals.

Can I manage performance goals of my matrix reports?

As matrix managers, you can manage the performance goals of your matrix reports just like their line manager.

Note that you can't see your matrix reports in the My Team work area. You need to search for your matrix reports and then view their goal plans on the Goals tab of the report's person spotlight page.

If your organization has enabled assignment level security, then you can see only the performance goals for the assignments you've access to.

Related Topics
- How You Manage Performance Goals for Your Team Members

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4 Manage Your Goals

How You Manage Your Performance Goals

You manage your performance goals on your Goals page.

To open your Goals page, go to **Me** > **Career and Performance** > **Goals**. You can also mark performance goals that you create as private. Private goals aren't visible to others.

Manage Your Goals

You can manage performance goals in these ways:

- Add performance goals and update them throughout the review cycle.
- Update your person profile by adding target outcomes to goals, if this is enabled.
- Add and update tasks to provide specific actions that determine how you can achieve your goals.
- Add notes to your performance goals and delete notes you added that you no longer need.
- Share your performance goals with others.
- Align your performance goals to shared organization goals in addition to goals shared by managers and colleagues.
- Copy a goal and change the goal plan and attributes of the new copied goal as appropriate. The copied goal is added to the worker's goals plan.
- Move a goal to another goal plan. The goal that's moved is no longer associated with the source goal plan.
- Extend a goal to another goal plan to let the worker continue working on the goal for a period later than the current goal plan. The target goal plan must have an end date later than the end date of the current goal plan. After extending, the goal is associated with both the source and target goal plans. Any subsequent changes to the goal in the source goal plan are also carried onto the target goal plan after you extend the goal.
- Add measurements to goals provided measurements are enabled.
- Cancel or delete goals assigned by HR specialists if this option has been enabled in the goal plan.

Notifications Generated

If enabled, notifications are generated when you perform actions on performance goals.

This table lists the notifications that your administrator must enable for notifications to be sent for various actions that you perform on performance goals.

Notification to Enable	Action	Who Receives the Notification
Worker shares a goal	Share your performance goal.	Employees with who you share your goals and their managers
Worker updates a completed goal	Edit a completed goal.	Your manager

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Notification to Enable	Action	Who Receives the Notification
Worker cancels a goal assigned by HR	Cancel a performance goal that was assigned to you by your HR specialist.	The HR specialist who assigned the goal
Worker deletes a goal assigned by HR	Delete a performance goal that was assigned to you by your HR specialist.	The HR specialist who assigned the goal
Worker creates a note to an assigned goal	Add a note to your performance goal	Your manager
Worker deletes a note to an assigned goal	Delete a note from your performance goal	Your manager

Related Topics

- Overview of Goal Management
- How You Make Performance Goals Available to Workers
- How You Share Performance Goals
- Performance Goals Alignment
- Goal Notifications

Manage Your Goals

This example shows how to track your goals progress, edit details of an existing goal, view goal alignment within your organization, and share a goal with your direct reports.

▶ **Watch video**

The following table summarizes key decisions for this scenario.

Decisions to Consider	This Example
Which review period is associated with my goals?	2020 Annual Cycle
Which goal plan is associated with the review period that includes my goals?	2020 Performance Goals
What are the goals assigned to me?	You're assigned these goals: • Developing the team • Increase Shareholder Value • Bring Customer Satisfaction Levels to 90% • Complete Business Ethics Course

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Decisions to Consider	This Example
Is drill-down mode enabled?	Yes

Summary of the Tasks

Do these tasks to manage your goals:

1. View your goals
2. Edit details of an existing goal
3. View the goal alignment details
4. Share the goal

View Your Goals

1. Click **Me** > **Career and Performance** > **Goals**.
2. From the review periods list on the Goals page, select **2020 Annual Cycle**.
3. From the **Goal Plan** list, select **2020 Performance Goals**. On the Goals page, you can view and update the priority, weight, and your progress for each goal included in this goal plan.

Edit Your Goals

In the drill-down mode, click the goal name to edit goals that you're assigned.

1. To edit your goal Bring Customer Satisfaction Levels to 90%, on the Goals page, click the goal name. On the goal page, you can view goal details such as its name, start date, description, and success criteria. If enabled, you can also view measurements, target outcomes, and tasks for the goal.
2. In the Basic Info section, click **Edit**. This table shows the properties of the goal that you need to edit.

Field	Value
Category	Customer satisfaction
Level	Target
Description	Improve overall customer satisfaction to 90% based on customer surveys during the evaluation period.

3. Click **Save** to save changes to the goal.

View Goal Alignment

If a goal is aligned to other goals or other goals are aligned to the goal, you can view the goal alignment details. You can see these details in the Alignment section of the goal page.

1. On the Goals page, click the goal name **Developing the team**.
2. Expand the Alignment section. You can view goals that the **Developing the team** goal is aligned to and goals that are aligned to this goal.

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Share Your Goals

You can share your goals.

1. On your Goals page, select the goals that you want to share.
2. From the Actions menu, select **Share**.
3. On the Share Goals page, ensure that the **Share tasks** check box is selected.
4. In the Share Goals With section, you can select whom to share the goal with.

   - As a manager, to share the selected goals with the whole team, select the check box before the **Add Worker** list.
   - If you don't want to share with some reports, clear the check box before their names.
   - To share with specific people, search and select the person from the **Add Worker** list.

5. Click **Save and Close**. The goal is shared with selected workers. The workers can view the shared goals in the Goals Shared with Me section of their Goals page.
6. You can view details of whom you have shared the goal with in the Shared With section of the goal page.

Related Topics
- Overview of Goal Management

How You Manage Goals Shared With You

You can see goals shared with you in the Goals Shared with Me section of your Goals page.

Your manager or your colleagues can share their goal with you if they think that you also need to achieve that objective. For example, if your manager has a performance goal to **Increase sales for Quarter 3 by 15%**, your manager might decide to share that goal with you.

Goals that your manager or organization owner shares with the organization are referred to as organization goals. These goals will also be part of your shared goals.

View Shared Goals

The shared goals in the Goals Shared with Me section of your Goals page are grouped appropriately in these subsections:

- HR Goals
- Manager Goals
- Colleagues Goals
- Organization Goals

By default, you can view these attributes for a shared goal:

- Goal name
- Goal description
- Name of person who shared the goal with you
- The date the goal was shared with you

You can view these additional attributes for organization goals that are part of your shared goals:

- Department of person who shared the goal with you
- Priority
- Target completion date

Your administrator can make these additional attributes visible for shared goals in Transaction Design Studio:

- Category
- Level
- Related link
- Start date
- Status
- Subtype

Sort Shared Goals

When many goals are shared with you, you might want to view the goals in a particular order. You can sort goals that you see in the Goals Shared with Me section based on these attributes:

- Name of the person who shared the goal
- Shared date
- Goal name

Add and Update Shared Goals

To include a shared goal in your goal plan, select the goals and then click **Add as My Goal**. You can then select any assigned goal plan for the review period. The goals that you added are no longer listed in the Goals Shared with Me section.

> **Note:** If your administrator has enabled approvals, you will continue to see the selected goals in the Goals Shared with Me section until the approval is complete.

When you add a goal shared by your HR specialist, manager, or your organization owner, the added goal aligns automatically to the shared goal. This ensures that the added goal supports the original goal. But remember that the original goal doesn't reflect any change you make for the shared goal.

Remove Shared Goals

You might not want to include some goals shared by your manager or colleagues as part of your goal plan. You can remove such goals from the Goals Shared with Me section. But remember that your manager or colleague can share the goal with you again.

Note that you can't remove the organization goals that are present in the Goals Shared with Me section of your Goals page.

Related Topics
- How You Share Performance Goals

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Request Feedback for Your Performance Goals

You can request feedback for your performance goals, including private goals, from anyone in your organization.

The feedback you receive can help you to understand if you're aligned with your organizational objectives and improve your performance. You can also share the feedback you receive with your manager.

You can identify the goals for which feedback is requested by the **Feedback Requested** label.

Before You Request Feedback

You can request feedback only if these criteria are met:

- An active performance goal feedback template exists.
- Your administrator has enabled these features for performance goals:
    - Drill-down mode
    - Feedback requests in Transaction Design Studio

Feedback Section

You request feedback in the Feedback section of the goal page. You can also view the feedback requested for the goal in this section with these details:

- The person whose feedback is requested
- The status of the feedback request
- When the feedback is due
- The person who requested the feedback
- The date the feedback was requested

You can filter the feedback requests by their status.

Request Feedback

To request feedback for your goals:

1. Go to your Goals page.
2. Select the goal plan that has the goals for which you want to request feedback.
3. Select the goals in your goal plan for which you want to request feedback.
4. Select the **Request Feedback** action.
5. Specify these details on the Request Feedback for Me page:
    - People whose feedback you want.

        Tip: Did you know that you can select any or all of your peers or direct reports when requesting feedback? If your administrator has enabled this feature, you can see the **Select Peers** and **Select Direct Reports** buttons to do this.

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       ◦ You can opt to share the feedback with your manager. You can also opt out of reviewing the feedback about yourself by clearing the **Share feedback with me** check box. If you select this check box, you can view the feedback provided on your Feedback spotlight page.

       ◦ Any additional questions you want to add for the selected goals.

       ◦ The date by when you need the feedback and an optional message for the person you're requesting feedback from.

         | **Note:** The due date for the feedback and the message sent is the same for all the selected goals.

6. Click **Submit**.

Check the Feedback Request Status

You can check the status of your feedback requests in these page sections:

- Feedback section of the goal page
- Feedback Requests About Me section of your Feedback page

FAQs for Manage Your Goals

What happens if I add a goal to my own goals from the organization or shared performance goals?

Performance goals that you add from the organization, your manager, or a colleague's, goals are automatically aligned to the added goal.

If the goal creator configures the goal to allow updates, you can edit some attributes of the goal to make it suitable for you. You can select the start and end dates for the goal.

Related Topics
- What happens if I align a performance goal?

Can I copy performance goals that are pending approval?

No, you can't copy performance goals that are pending approval. Goals that are pending approval are read-only until they're approved.

Can I update my performance goal after I have submitted it for approval?

All goals submitted for approvals are read-only until the related goal plans are approved.

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When you submit a goal for approval, you also submit the goal plan to which the goal is added for approval for all goal plan changes. All goals in the goal plan are read-only until the approval request is completed.

Can I delete performance goals?

You can delete performance goals that you created if they aren't included in any performance or check-in documents.

How can I update or track progress toward performance goal completion?

You can update the goal completion percentage at any time throughout the goal plan period as you progress toward completing it.

In the drill-down mode, click the goal name on your Goals page to edit it. In the inline mode, click the **Edit** icon and update the completion percentage.

> **Note:** Your administrator needs to set the **Completion Percentage** field visible for you to update it.

How can I complete a performance goal?

Edit the goal that you want to mark as complete. Then in the Basic Info section, update the status of the goal to **Completed**.

After you change the status, you can also change the completion percentage to **100** and enter the actual completion date of the goal. If approvals are enabled, the goal is marked as **Completed** only after your manager approves.

Can I edit a completed performance goal?

You can edit a completed goal if the value of the **Completed Goal Edit Options** profile option is **Reopen** or **Always Edit**.

To edit profile option values for the goal management business process, your administrator needs to use the **Worker Goal Setting Profile Option Values** task in the Setup and Maintenance work area.

Why do I have performance goals assigned to me before I have added any?

Goals in your list of performance goals might have been assigned by a manager, the organization, or the HR specialist. You can't cancel or delete goals that are assigned to you.

Incomplete goals might also have been copied from previous goal plans when the HR specialist creates your current goal plan. Incomplete goals are those with the status of **Not started** or **In progress**.

5 Goal Actions

Performance Goals Alignment

You align performance goals to create a relationship between an employee's goal and a higher-level goal, such as an organization or manager goal. This relationship enables the employee's goal to support and contribute to achieve the higher-level organization, team, or manager goal.

You can align one of your goals to only one other goal; both goals must be associated with the same review period.

You can also align your goals with those of your colleagues to support their goals if they're within the same review period. This allows employees on informal teams or groups working across different reporting groups to show a relationship between each other. For the owner of the goal to which others are aligned, this is a way to determine how many people are working for the goal, for example, for a specific project or initiative. Remember that you can't align private goals to another goal or have other goals aligned to them.

If a goal is aligned to another goal, you can see the **Aligned** label for both the source goal and aligned goal on the Goals page.

Automatic Goal Alignment

When organization owners share their goal with employees in their organization, or managers assign their own goals to employees, then the assigned goals are copies of the source goal. These assigned goals are automatically aligned to the source goal. Goals that you add from the Goals Shared with Me section of your Goals page are also automatically aligned to the shared source goal.

Remove a Goal Alignment

Managers, employees, and HR specialists can remove the alignment from one goal to another. Deleting a goal that's aligned to another goal removes the alignment between the goals. The goal that isn't deleted isn't affected, and you can align the remaining goal to another goal. If you cancel an organization goal, its alignment to other goals is also removed.

Related Topics
- How You Create Organization Goals
- What happens if I align a performance goal?

How You Share Performance Goals

You can share performance goals with your team members or your colleagues. To share goals, select the **Share** action for a goal on your Goals page.

The people you share your goal with can add a copy of the shared goal to their goal plan. For example, as a manager, you might want your team member to know about the goals for overseas assignment but would like the team member to decide whether or not to add the goals.

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As a manager, you can share your goals with your direct reports, dotted-line reports, or selected persons. By default, all team members are selected when you try to share a goal as a manager. As an employee, you can share your goals with colleagues you select. You can also share tasks that are associated with goals. A notification is sent to the people you share the goal with.

You can identify goals that you have shared with others by their **Shared** label.

Shared Attributes

These attributes of the original goal are shared with the recipient:

- Goal name

- Goal details including start date, target completion date, category, level, and description

- Measurement attributes including name, unit of measure, target type, and target value

- Target outcome attributes including name, description, and source

- Tasks attributes including name, type, priority, start date, and related link

Note: Profile options determine if you can add target outcomes and tasks to a goal. You set up profile options in the Setup and Maintenance work area. Goal plan settings determine which key goal fields of an added goal you can change. When you share a goal, you can decide further whether to share tasks, if enabled.

Sharing Goals when a Worker or Manager Transfers

When an employee or manager transfers and that person is no longer a direct report of the manager, the goal is still available to the employee in the Goals Shared with Me section of the employee's Goals page.

Related Topics
- How You Make Performance Goals Available to Workers
- Goal Plans
- What happens if I share a performance goal?
- Goal Management Profile Options

How You Assign Performance Goals

As a manager, you can assign your own goals or a new goal to your team members.

You can also assign goals to people who don't directly report to you. But you can do this only when a primary goal plan is active.

You can assign goals to your team members only if one or more of them have a goal plan assigned for the selected review period. If none of the selected members have an assigned goal plan for the selected review period, you will see an error message.

By default, the maximum number of people you can assign performance goals to is 498. If you need to assign performance goals to more people, your administrator needs to create a mass assignment process adding you as a requester.

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You can specify a weight for the goals you assign if the selected goal plan is weight enabled. If you selected more than one goal to assign, you can specify different weights for each goal. Note that the weights that you specify for the assigned goals may cause the total goal plan weight to exceed 100. If the goal plan enforces that the sum of weights to be 100, you can see a banner on the worker's goal page with a warning to correct the goal plan weights.

When you assign goals, by default the people assigned the goal can change the key attributes of the assigned goal. If you don't want them to modify the key attributes, then clear the **Allow worker to update key attributes** check box.

If your administrator has enabled the **Manager assigns a goal notification** setting, then a notification is sent to these people after the goal assignment is complete:

- The manager who assigned the goal
- Employees who have been assigned the goal

Assign Your Performance Goals

As a manager, you can assign your own performance goals to one or more workers.

You usually assign your performance goals to people who report to you. But when a primary goal plan is active, you can also assign goals to people who don't directly report to you.

Assign Your Goals When There's No Active Primary Goal Plan

1. Go to your Goals page.
2. Select the review period and goal plan.
3. Select the performance goals you want to assign.
4. From the Actions menu, select **Assign**.

   You can see the Assign Goal page.
5. If the selected goal plan is weight enabled, specify the weight for each of the selected performance goals.
6. Select the team members for goal assignment. On the Assign Goal page, you can see only team members who have a goal plan for the selected review period. You can search for specific team members to assign goals. You need to type at least 3 characters in the search field to find specific team members. You can view the team members whose name contains the characters entered. You can deselect the persons who you don't want to assign the goal. Or you can clear the **Select All** check box and then search for and select persons to assign goals.

   Note: Select the **Show only selected people** check box to see only the persons you selected for goal assignment.

7. By default the goal plan you selected is shown for each team member. Select another goal plan to assign the goal to a different goal plan.
8. Click **Submit**.

Assign Your Goals When a Primary Goal Plan Is Active

When a primary goal plan is active, the primary goal plan for the selected review period is the goal plan to which the selected goals are assigned. You can't select another goal plan for your team members. But did you know that you can also include all indirect reports? You can do this when all the listed employees are selected in the Assign To section of the Assign Goal page.

Related Topics
- Primary Goal Plan

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Assign New Performance Goals

As a manager, you can add a new performance goal to your team members.

Assign a New Goal When There's No Active Primary Goal Plan

1. Go to **My Team** > **Performance Overview**.
2. On the Goals and Performance Overview page, select the review period.
3. Select the team members for goal assignment.
4. Click **Add Performance Goal**.

    On the Add Performance Goal page, for each selected employee, the first active goal plan assigned to the employee in the review period is shown.
5. Select the goal plan to which you want to add the goal for the selected employees.
6. To also add the goal to your goal plan, select **Include myself** and select the goal plan to which you want to add the goal.
7. Specify the goal details including the goal weight.
8. Click **Submit**.

Assign a New Goal When a Primary Goal Plan Is Active

When a primary goal plan is active, the primary goal plan for the selected review period is the goal plan to which the selected goals are assigned. You can't select another goal plan for your team members. But you can include all indirect reports in the goal assignment.

Related Topics
- Primary Goal Plan

How You Print Performance Goals

You can print performance goals to have a record of the goals assigned to you or the goals of your team members.

Your administrator needs to enable printing of goals before you can print goals.

Print Your Goals

You can print your performance goals from your Goals page.

1. Click **Me** > **Career and Performance** > **Goals**.
2. If you have multiple assignments, select the assignment for which you want to print goals.
3. From the **Review Period** list on the Goals page, select the review period for which you want to print goals.
4. From the **Goal Plan** list, select the goal plan.
5. Select the goals that you want to print.
6. From the **Actions** menu, select the **Print** action.

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Print Your Team Member's Goals

You can print your team member's performance goals from your team member's person spotlight Goals page.

1. Go to your team member's person spotlight Goals page.
2. If they have multiple assignments, select the assignment for which you want to print goals.
3. From the **Review Period** list on the Goals page, select the review period for which you want to print goals.
4. From the **Goal Plan** list, select the goal plan.
5. Select the goals that you want to print.
6. From the **Actions** menu, select the **Print** action.

Print Results

The print output has different sections for each of the selected goals. You can see these details in the print output:

- **Person information**: Assignment number, person number, job, location, and manager information of the person whose goals are printed

- **Goal plan information**: Goal plan name, review period, and start and end dates

- **Goal information**: Goal name and other goal details, measurements, tasks, target outcomes, and feedback requests

How Goal Management Settings Control Goal Actions

The settings you specify when you create a goal or a goal plan determine if managers or employees can access the goals or goal plans and the actions they can perform.

Goal Management Settings
This table lists the different settings and describes their impact.

Setting	Where You Set	Type	Who Sets This	When is the Setting Specified	Impact
Allow Updates to Goals By	Goal Plan	A list with these options: • HR specialist • HR specialist and manager • HR specialist, manager, and worker	HR specialist	When creating or editing a goal plan	This controls who can update the goals in the goal plan.
Actions for Workers and Managers on HR-Assigned Goals	Goal Plan	A list with these options: • Cancel and delete	HR specialist	When creating or editing a goal plan	This determines if managers and employees can cancel or delete goals that HR specialists assign.

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Setting	Where You Set	Type	Who Sets This	When is the Setting Specified	Impact
		• Cancel only • Delete only			**Note:** This setting is enabled only if the value of the **Allow Updates to Goals By** setting is **HR specialist, manager, and worker**.
Allow worker to update key attributes	Goal	A check box that can be enabled or disabled.	• HR specialist • Manager	When assigning a goal	This determines if the goal assignees can update the key attributes of the goal or not. If you clear the check box, the goal assignees can update only nonkey attributes such as status and description. **Note:** You can select this check box only if the value of the **Allow Updates to Goals By** setting is **HR specialist, manager, and worker**.

Source	Goal	An application-generated value that can be one of these:
		
		• HR specialist
		• Manager
		• HR specialist and manager
		• Worker
			Application	The values are set based on who created or assigned the goal.
				
				• **HR specialist**: When an HR specialist assigns a goal to an employee
				• **Manager**: When a manager assigns a goal to an employee
				• **HR specialist and manager**: When a user who's both the manager and HR specialist assigns a goal to an employee
					• If a goal's source is **HR specialist**, then any HR specialist who has access to the goal can delete or cancel the goal.
					• If the goal source is **Manager**, then only these people can delete or cancel the goal:
					  o Manager who assigned the goal
					  o Managers above the employee's manager in the manager hierarchy
					  o HR specialists of the goal assignee

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Setting	Where You Set	Type	Who Sets This	When is the Setting Specified	Impact
				• **Worker**: When employees create a goal for themselves	• If the goal source is **HR specialist and manager**, then only these people can delete or cancel it: ○ The user who's both the manager and HR specialist who assigned the goal ○ HR specialists of the goal assignee • If the goal source is Worker, then only the employees who created the goal or their HR specialists can delete or cancel it.

How Goal Management Settings Work Together

This table describes the impact for different combinations of the Allow Updates to Goals By and Allow worker to update key attributes Goal Management settings.

Allow Updates to Goals By Goal Plan Setting	Allow worker to update key attributes Goal Setting	What Managers Can Do	What Employees Can Do
HR specialist	No	• Can't add goals • Can't update goals	• Can't add goals • Can't update goals
HR specialist and manager	No	• Can add goals to a team member's goal plan • Can update goals in a team member's goal plan	• Can't add goals • Can't update goals
HR specialist, manager, and worker	No **Note:** Managers can update this setting only for goals assigned to a team member by the manager or HR specialists.	• Can add goals to a team member's goal plan • Can update goals in a team member's goal plan	• Can update only progress attributes for assigned goals • Can add and update own goals without any restrictions
HR specialist, manager, and worker	Yes	• Can add goals to a team member's goal plan	• Can update assigned goals without any restrictions

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Allow Updates to Goals By Goal Plan Setting	Allow worker to update key attributes Goal Setting	What Managers Can Do	What Employees Can Do
	Note: Managers can update this setting only for goals assigned to a team member by the manager or HR specialists.	• Can update goals in a team member's goal plan	• Can add and update own goals without any restrictions

Related Topics
- What's a key performance goal field?

Validations for Goal Actions

You may have noticed that some goal actions are disabled for the goals you select in a goal plan. The application performs validations that determine whether certain goal actions are disabled. If any of these validations fail, then the goal actions are disabled.

This topic deals with the validations for actions that you can do on performance goals that aren't part of performance documents.

When Edit Weight Goal Action is Enabled

Enabling the **Edit Weight** action for performance goals doesn't depend on the goal selected. It depends on the value of the **Enable inline weight update** profile option. If the value of this profile option is **No**, then you can select the **Edit Weight** action. Also note that this action is disabled for goal plans that are pending approval except for these cases:

- The approver sends the goal plan back to the employee with a request for more information.

- The current approver edits the goal plan when approving the plan.

If the value of the **Enable inline weight update** profile option is **Yes**, then you can edit the goal weight by editing the goal.

When Other Goal Actions Are Enabled

This table shows when goal actions are enabled and when they're disabled. The first column in the table lists the goal actions. The other columns indicate if the action is enabled or not for various use cases.

Note: The goal action is disabled even if the validation fails for a single use case. For example, if the selected goal is private but is marked as complete, then the delete action is disabled.

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Action	User Hasn't Created the Goal	Selected Goal Is Canceled	Selected Goal Is Complete	Non-Zero Weight Goal in Goal Plan That Enforces Weight Validation	New Goal in Draft Approvals State	Updated Goal in Draft Approvals State	Deleted Goal in Draft Approvals State	Canceled Goal in Draft Approvals State	Private Goal	Organization Goal
Delete	• Enable if employ or manag are allowed to delete HR assigne goals • Disable otherw	Enabled	Disabled	Enabled	Enabled	Enabled	Disabled	Enabled	Enabled	Enabled
Cancel	• Enable if employ or manag are allowed to cancel HR assigne goals • Disable otherw	Disabled	Disabled	Disabled	Disabled	Disabled	Disabled	Disabled	Enabled	Enabled
Move	Enabled	Disabled	Disabled	Disabled	Disabled	Disabled	Disabled	Disabled	Enabled	Enabled
Copy	Enabled	Disabled	Enabled	Enabled	Disabled	Disabled	Disabled	Disabled	Enabled	Enabled
Extend	Enabled	Disabled	Disabled	Enabled	Disabled	Disabled	Disabled	Disabled	Enabled	Enabled
Share	Enabled	Disabled	Enabled	Enabled	Disabled	Disabled	Disabled	Disabled	Disabled	Disabled
Align	Enabled	Disabled	Disabled	Enabled	Disabled	Disabled	Disabled	Disabled	Disabled	Enabled
Assign	Enabled only if the user has a manager role	Disabled	Enabled	Enabled	Disabled	Disabled	Disabled	Disabled	Disabled	Enabled
Print	Enabled	Enabled	Enabled	Enabled	Enabled	Enabled	Enabled	Enabled	Enabled	Enabled

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Action	User Hasn't Created the Goal	Selected Goal Is Canceled	Selected Goal Is Complete	Non-Zero Weight Goal in Goal Plan That Enforces Weight Validation	New Goal in Draft Approvals State	Updated Goal in Draft Approvals State	Deleted Goal in Draft Approvals State	Canceled Goal in Draft Approvals State	Private Goal	Organization Goal

Also remember that all goal actions are disabled for these use cases:

- An employee selects a goal in a goal plan that can be updated only by an HR specialist or manager.

- A manager selects a goal in a goal plan that can be updated only by an HR specialist.

- Approvals are pending for the goal plan.

- No goals are selected in the goal plan.

Validations for Goal Actions for Goals in Performance or Check-In Documents

This topic deals with the validations for actions that you can do on performance goals that are part of performance or check-in documents.

> **Note:** Validations for actions on goals included in performance or check-in documents also depend on the validations for goal actions in general. If Goal Management validation doesn't allow an action, you can't perform that action.

This table shows when actions are enabled and when they're disabled for goals that are part of performance or check-in documents. Enabling performance document synchronization also has an impact on enabling or disabling of the goal actions. The first column in the table lists the goal actions. The other columns indicate if the action is enabled or not for various use cases.

Action	Goal Added to a Check-In Document	Goal Added to a Performance Document When Performance Document Synchronization Isn't Enabled	Goal Added to a Performance Document Is Rated or Commented When Performance Document Synchronization Is Enabled	Goal Added to a Performance Document Isn't Rated or Commented When Performance Document Synchronization Is Enabled
Delete	Disabled	Disabled	Disabled	Enabled
Cancel	Enabled	Disabled	Disabled	Enabled
Move	Disabled	Disabled	Disabled	Enabled
Copy	Enabled	Enabled	Enabled	Enabled

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Action	Goal Added to a Check-In Document	Goal Added to a Performance Document When Performance Document Synchronization Isn't Enabled	Goal Added to a Performance Document Is Rated or Commented When Performance Document Synchronization Is Enabled	Goal Added to a Performance Document Isn't Rated or Commented When Performance Document Synchronization Is Enabled
Extend	Enabled	Enabled	Enabled	Enabled
Share	Enabled	Enabled	Enabled	Enabled
Align	Enabled	Enabled	Enabled	Enabled
Assign	Enabled	Enabled	Enabled	Enabled
Print	Enabled	Enabled	Enabled	Enabled

FAQs for Goal Actions

What happens if I align a performance goal?

When you align a performance goal to another goal referred to as the source goal, you create a relationship between the two that indicates that the aligned goal supports the source goal.

Source goals are either organization goals or goals assigned or shared by your managers or colleagues. However, the goal you align is independent. You can update or modify the aligned goals as needed, or remove the alignment.

What happens if I share a performance goal?

A shared performance goal is available to people you share the goal with. They can add it to their own list of goals or align their own goals to it, when alignment is configured.

The goal you share belongs only to you and can't be changed by the people you share the goal with.

What's the difference between canceling and deleting performance goals?

You have options to cancel or delete performance goals.

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When you delete a performance goal, the goal is permanently removed from the goal plan. Employees and managers can no longer see the goal. You usually delete goals that are no longer relevant for measuring your performance or goals that you created in error.

When you cancel a performance goal, the goal remains in the goal plan. No one can edit the goal even if they have access to the goal plan. If the goal was earlier included in any performance document, it continues to be part of the performance document. For example, after you have moved to a new role, you can cancel goals that are no longer relevant for the new role. But because it isn't removed from the performance document that it was earlier added to, it can be part of your performance discussion.

6 Organization Goals

How You Create Organization Goals

An organization goal is a goal that a manager can share with other employees in the manager's organization to meet the objectives of the organization.

For example, if the objective of the organization is "To increase market share by 20% by the end of the year", then the sales manager can create an organization goal as "Increase sales by 25% by the end of the year".

To create an organization goal, these conditions need to be fulfilled:

- Your administrator needs to enable the **HRG_ENABLE_ORGANIZATION_GOAL** profile option.
- You need to have the **Manage Performance Goal for Organization** privilege.

To create an organization goal, you create a goal in your Goals page, and then select the **Share this goal with your organization** check box.

> **Note:** You can't share a private goal as an organization goal.

You can easily identify the organization goals on your Goals page by their **Organization Goal** label.

What Happens When You Share a Goal as an Organization Goal

The organization goals that you create are automatically shared with employees who report to you. They can see this goal in the Organization Goals subsection of the Goals Shared with Me section of their goal page.

What Actions You Can Perform on an Organization Goal

Did you know that you can perform the same actions on organization goals as those for regular goals? But, you can't share these goals because they're automatically shared.

You can assign an organization goal to employees who report to you. You can align the organization goal to any goal that's shared with you.

FAQs for Organization Goals

How can I manage organization goals?

As an administrator, you manage organization goals just like you manage other performance goals. Navigate to the Performance Goals page. In the Filters pane, select the Organization goals check box to view only organization goals.

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How can I enable line managers to create organization goals?

By default, line managers can't create organization goals.

To allow some line managers to create organization goals, you need to assign the **Manage Performance Goal for Organization** (**HRG_MANAGE_PERFORMANCE_GOAL_FOR_ORGANIZATION_PRIV**) privilege to their role.

How can I transfer organization goals from one organization owner to another?

As an HR specialist, you can transfer organization goals from one organization owner to another on the Performance Goals page.

Select the organization goals that you want to transfer and from the **Actions** menu, select **Transfer**.

On the Transfer Goals page, specify these values:

- Organization owner to whom you want to transfer
- Review period
- Goal plan
- Start and target completion dates

Can I change an organization goal to a regular goal?

Yes, you can. You need to edit the goal and clear the check box that allows sharing of the goal with others in the organization.

Remember that all goal alignments with the organization goal are removed when you change the organization goal to a regular goal.

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7 Goal Administration

Administer Goals

How You Administer Performance Goals

As an administrator, you maintain performance goals on the administrator Goals page.

To view the administrator Goals page, go to **My Client Groups** > **Goals**.

Administer Goals

This table lists the links available on the administrator Goals page and the actions that you can do on the pages that you navigate to from the link.

Link on Administrator Goals Page	Actions You Can Do	Comments
Performance Goals	- Cancel a goal. - Delete a goal. - Transfer an organization goal to another organization owner.	- You can search for goals by specifying a search criteria such as the worker, manager, or department name. - You can also filter the goals to view only organization goals or worker goals.
Performance Goal Library	- Edit an existing library goal. - Add a library goal. - Edit the translation of a library goal in any supported language.	NA
Review Periods	- Create a review period. - Edit an existing review period.	You can't delete an existing review period. But you can inactivate it.
Goal Plans	- Add a goal plan. - Edit a goal plan. - Manage goal plan assignees.	- By default, you can see the goal plans for the review period with the latest start date. - You can't schedule goal plan assignment processes from the Goals Plans page. Use **Tools** > **Scheduled Processes** or the **Scheduled Process for Performance Goals** link on the administrator Goals landing page instead.
Goal Plans Sets	- Create a goal plan set. - Edit an existing goal plan set.	You can see this link only if you have enabled the goal plan sets feature.
Eligibility Profiles	- Create an eligibility profile. - Edit an existing eligibility profile. - Delete an existing eligibility profile.	

Link on Administrator Goals Page	Actions You Can Do	Comments
Setup of Performance Goals Mass Assignment and Mass Sharing	• Create a mass assignment or mass sharing process. • Copy an existing mass assignment or mass sharing process. • Edit or delete an existing mass assignment or mass sharing process.	• The review period with the latest start date is the default review period. • You can't schedule mass assignment or sharing processes from the Setup of Performance Goals Mass Assignment and Mass Sharing page. Use **Tools > Scheduled Processes** or the **Scheduled Process for Performance Goals** link on the administrator Goals landing page instead.
Scheduled Processes for Performance Goals	Schedule processes for these goal tasks: • Mass assign or share goals. • Assign goal plans. • Assign goal plan sets.	NA
Pending Goal Plans	Approve pending goal plans.	• This link is hidden by default. To show this link, from Navigator, go to **Tools > Structure**. • We recommend to use the Transaction Console to approve pending goal plans.

Related Topics
- Mass Assignment of Performance Goals
- How You Create Goal Plans
- Goal Library
- Guidelines for Creating Goal Plan Sets

How You Manage Feedback Requests of Performance Goals

As HR specialists, you can manage feedback requests of performance goals.

You need to have the **Administer Requested Feedback** aggregate privilege to manage feedback requests. You manage feedback requests in these ways:

- Raise feedback revision requests.
- Delete feedback requests.

Raise Feedback Revision Requests

You can ask people who already provided feedback to revise their feedback. The person who submitted the request for feedback and the person who you're asking to revise the feedback will receive a notification about the revision request.

To send a feedback revision request:

1. Go to the feedback request row on the Feedback page of the person.
2. From the Actions menu, select **Revise**.

3. On the Revise Performance Goal Feedback page, optionally enter a message and submit the feedback revision request.

Delete Feedback Requests

You can delete the feedback request for the goal of any person you have access to regardless of the status of the feedback request. You can delete the feedback request in these ways:

- Go to the Feedback page of the person and use the **Delete** action of the feedback request.

- Open the goal page, and in the Feedback section use the **Delete** action of the feedback request.

FAQs for Administer Goals

Can I allow managers and workers to delete goals I assign?

As an HR specialist, you can now allow managers and workers to delete goals you add.

You can do this when you add a performance goal to the goal plan of an employee or when you add goals in a mass assignment process. In the Basic Info section of the goal, from the **Users Permitted to Delete HR-Assigned Goals** list, select the appropriate option to allow only managers or managers and employees to delete the goal.

Note that this setting overrides the **Actions for Workers and Managers on HR-Assigned Goals** and the **Allow Updates to Goals By** settings of the goal plan.

How can I create a feedback template for performance goals?

For users to request feedback for performance goals, administrators first need to create a feedback template for performance goals.

Here's how they can do this:

1. Go to **My Client Groups** > **Performance**.
2. Select **Feedback Templates**.
3. On the Feedback Templates page, click **Add**. You see the Create Feedback Template page.
4. Specify these details:

    - Name of the template

    - Status as **Active**

    - Template type as **Performance Goal Feedback**

    - Attributes to share in the feedback request

5. Click **Save and Close**.

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Approve Goals

Approval Process for Performance Goals

If Bypass Approvals hasn't been enabled, then goal changes can go for approval. You can find the delivered Performance Goals approval rule set in the Transaction Console. An administrator can configure the goal approval rule set in Transaction Console.

You can make manychanges to goals in a goal plan and submit all the changes together for approval. Remember that transactions of Performance Goals are evaluated as a single approval transaction. When you submit a goal plan for approval, all submitted actions are evaluated and even if there's one transaction that requires manual approval, all other actions are also considered for manual approval.

This image shows the typical approval flow. As you can see in the image an approver can request for more information before approving the goal changes.

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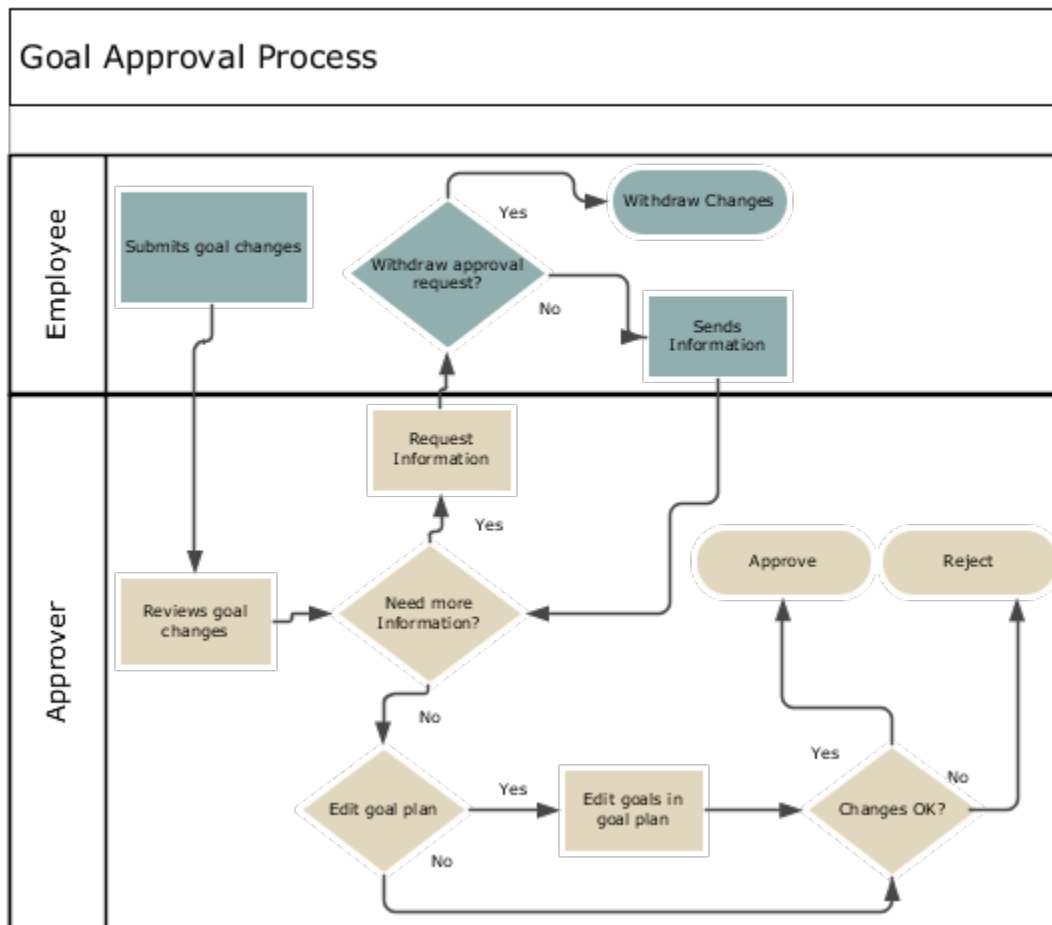
> **Note:** More than one approver can be involved in the goal approval process.

Submit Goal Changes for Approval

When an employee makes some changes to the goals in a goal plan, the goal plan is locked. Other users including the employee's manager can't change that goal plan.

All performance goal changes are saved in a transaction cache and not in the Goal Management database. The data is moved from the cache to the application database only after approval.

This table defines the rules that apply for the various goal actions that an employee can do before submitting the goal plan for approval.

Action	Rules that Apply
Assign	• You can assign only existing and unchanged goals. • You can't assign any goals that you've added for which approval is pending.
Move Cancel Delete	• If the goal plan is configured with 100% weight validation, then the goal's weight is automatically set to 0. • When you delete a newly added goal, it's removed from the cache and the goal plan page. • After you cancel an existing goal, you can only delete that goal. You can't perform any other action. • After deleting an existing goal, you can't perform any other action on that goal.
Copy	• You can't copy a newly added goal. • You can copy only existing and unchanged goals.

> **Note:** When the goal plan is submitted for approval and if the goal plan is configured with 100% weight validation, an error results if the weights of the goals in the goal plan don't add up to 100.

If your administrator has enabled the Comments and Attachments sections, while submitting the goal changes the employee can also add comments or some files as attachments. But if your administrator has disabled the Comments and Attachments sections, the employee can't add comments or attachments.

After the employee submits the goal changes, only the employee and the current approver can view the changes. Other users can't see the changes until the changes are approved. After the employee has submitted the changes, the employee can't make any further changes in the goal plan until any of these conditions is true:

- The employee withdraws the approval request for the goal plan.
- The current approver requests for more information.
- The changes are approved by all approvers.
- An approver rejects the changes.

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Review Goal Changes

After an employee submits the goal changes, the current approver receives a notification. Approvers can also use the Worklist to check for goal plans that require their approval. They can review the details of the changes made and the approval history. They can do any of these actions:

- Edit and approve the goal plan.
- Approve or reject the goal changes.
- Request for more information.

Request More Information

The approver can request more information regarding the goal plan for submitted approval. The approver can also add comments or attachments when requesting for information.

When requesting information, the approver can specify these details in the request:

- **Name**: Select the person who needs to provide the information. By default, the name of the person who submitted the goal plan for approval is shown.
- **Return Options**: Select one of these values to indicate the recipient of the information:
  - **Back to me**: To send the information to the approver
  - **Follow approval flow**: To send the information to the next person in the approval chain

The approver can't perform any of these actions while waiting for the requested information:

- Make any changes to the goal plan.
- Select any goal action such as copying or sharing a goal.

But note that when the employee edits the goal for which the approver has requested more information, the approver can view all changes to the goal plan including any new goals added to the goal plan.

Approve or Reject Goal Changes

See this table to understand what happens when an approver approves or rejects the goal changes.

Approval Action	Results
Approve	• All can view the changes in the goal plan including any new goals that were added. • Any added shared goals are removed from the Goals Shared with Me section. • The goal plan is no longer locked and managers can edit the goal plan. • The employee can continue to edit the goal plan. • Any deleted goal is removed from the goal plan.
Reject	• The employee receives a notification. The employee can see the rejection comments if there are any on the Worklist. • The goal plan is no longer locked and managers can edit the goal plan. • All changes made by the employee are reverted. • Any new goals that were added are removed from the goal plan.

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Related Topics

- How You Manage HCM Approval Transactions

FAQ for Approve Goals

As an administrator or HR specialist, can I approve performance goal plan transactions?

Yes. Use the Transaction Manager: Transactions page in the Transaction Console work area to approve goal plans.

1. Click **Navigator** > **Tools** > **Transaction Console**.
2. Make sure you're on the **Transaction Summary** tab.
3. Filter for **Approve Performance Goal** processes.
4. Click the goal plan that you want to approve.
5. From the Actions menu of the Approve Performance Goal page, select **Force Approval**.

8 Mass Assignment of Goals

Mass Assignment of Performance Goals

As an administrator, you might want to assign some performance goals to many employees in your organization at the same time.

Use the **Setup of Performance Goals Mass Assignment and Mass Sharing** link on the administrator's Goals page to mass assign performance goals.

To mass assign performance goals, do these steps:

1. Configure a mass assignment process. For instructions, refer to *Configure Mass Assignment Process for Performance Goals*.
2. Schedule the mass assignment process. For more information, refer to *How You Schedule a Process for Mass Assignment of Performance Goals*.

You can also create a mass assignment process for a manager, who's considered to be the requester of the mass assignment. After the mass assignment process is complete, the employees to whom you assigned the goals can see the goals on their Goals page.

Related Topics
- Options for Mass Assignment of Performance Goals

Configure Mass Assignment Process for Performance Goals

You configure the mass assignment process on the Setup of Performance Goals Mass Assignment and Mass Sharing page.

To navigate to the Setup of Performance Goals Mass Assignment and Mass Sharing page, go to **My Client Groups** > **Goals** > **Setup of Performance Goals Mass Assignment and Mass Sharing**.

1. On the Setup of Performance Goals Mass Assignment and Mass Sharing page, click **Add**
2. Select the process type as **Mass assign goals**.

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3. Specify these details:

   ○ A unique mass assignment process name

   ○ Review period

   ○ Goal Plan

     > **Note:** If an active primary goal plan exists for the review period, it's selected by default. You can't select another goal plan

   ○ The requester name if you're creating the process for a manager. Select the assignees after you specify a requester.

4. Add eligibility profiles to restrict the goal assignment to employees who conform to the added eligibility profiles.

   > **Note:** You can't specify eligibility profiles when you select a requester.

5. In the Included Workers section, add employees who you want to assign the performance goals to.

   > **Note:** You can't see the Included Workers section when you select a requester and specify that you want the goals to be assigned to only persons who report to the requester.

6. In the Goals section, if you haven't added a requester, add existing library goals or create goals. When you add a requester, you can select and add the requester's goals.

7. Click **Save and Close**.

What to do next

After creating a mass assignment request, you need to schedule the mass assignment process.

Related Topics

- How You Use Eligibility Profiles when Assigning Performance Goals
- How You Schedule a Process for Mass Assignment of Performance Goals

Options for Mass Assignment of Performance Goals

As an administrator, you can mass assign performance goals.

You need to specify these values when creating a mass assignment request:

- Process name

- Review period

- The goal plan to associate with the included goals

- The requester name if you're creating the mass assignment process for a manager

- The employees you want to assign the goals to

- Optionally, the eligibility profiles for the assignment

- The goals to assign

Here's what you need to consider while specifying some of these values.

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Process Name

The unique name for the mass assignment process helps you to identify the process when you want to copy, edit, or schedule the process.

Requester Name

If you're creating the request for someone else, for example, a manager, specify the person's name. You can select the assignees as one of these options:

- All employees who report to the manager

- Only the direct reports of the manager

- Only selected people

You can assign only the requester's goals when you specify a requester.

Eligibility Profiles

You can add eligibility profiles to restrict goal assignment only to employees who meet the profile criteria that you mark as required. You can limit assigning goals to workers who meet eligibility requirements by job, job role, location, age, or other criteria. For example, you can add a location eligibility profile to a request to restrict goals to individuals who are located in a certain place. You can further refine eligibility by adding role criteria to restrict workers by location and role.

Employees to Include

In the Included Workers section, you can select the employees to be assigned the goal. After selecting the employee, you need to select one of these options to indicate who to assign the goals to:

- Only the selected employee

- Only people who directly report to the selected employee

- All people who report to the selected employee

- Only the selected employee and the people who directly report to the selected employee

- The selected employee and all the people who report to the selected employee

Note: HR specialists can select any employee in the organization for assigning goals even if they don't have access to the employee.

Related Topics
- Mass Assignment of Performance Goals
- How You Use Eligibility Profiles when Assigning Performance Goals

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How You Schedule a Process for Mass Assignment of Performance Goals

To mass assign performance goals, you need to schedule a process after creating the mass assignment request.

This table shows the different ways that you can use to schedule the process for mass assigning performance goals and the parameters that you need to specify.

Navigation	Parameters
Scheduled Processes for Performance Goals link on the administrator Goals page	• **Process Type**: Mass assign or share goals • **Process Name**: The name of the mass assignment process that you want to schedule
Tools > **Scheduled Processes**	**Name**: Mass Assign Goals

Related Topics
- Overview of Performance Goals Scheduled Processes

9 Mass Share Performance Goals

Mass Sharing of Performance Goals

As HR specialists, you can now configure a process to mass share performance goals with selected workers you can access.

Use the **Setup of Performance Goals Mass Assignment and Mass Sharing** link on the administrator's Goals page to mass share performance goals.

To mass share performance goals, do these steps:

1. Configure a mass share process. For instructions, see the *Configure Mass Share Process for Performance Goals* topic.
2. Schedule the mass share process. For instructions, see the *Schedule a Process for Mass Sharing Performance Goals* topic.

Configure Mass Share Process for Performance Goals

You configure the mass share process for performance goals on the Setup of Performance Goals Mass Assignment and Mass Sharing page.

1. To navigate to the Setup of Performance Goals Mass Assignment and Mass Sharing page, go to **My Client Groups > Goals > Setup of Performance Goals Mass Assignment and Mass Sharing**.
2. On the Setup of Performance Goals Mass Assignment and Mass Sharing page, click **Add**.
3. Select the process type as **Mass share goals**.
4. Specify these details:
   - A unique process name for mass sharing performance goals
   - Review period
5. Add eligibility profiles to restrict the goal sharing to employees who conform to the added eligibility profiles.
6. In the Included Workers section, add employees who you want to share the performance goals with.
7. In the Goals section, add existing library goals or create performance goals.
8. Click **Save and Close**.

What to do next

After creating a mass share request, you need to schedule the mass share process.

Related Topics
- Eligibility Profiles

Schedule a Process for Mass Sharing Performance Goals

To mass share performance goals, you need to schedule a process after creating the mass share request.

1. Go to **My Client Groups** > **Goals** > **Scheduled Processes for Performance Goals**.
2. In the Basic Options section, specify the parameters listed in this table.

Parameter	Value
Process Type	Mass assign or share goals
Process Name	The name of the mass share request that you want to schedule

3. Click **Submit**.

Results:

Here's what happens after the mass share process completes successfully:

- If enabled, workers receive a notification that their HR specialist has shared performance goals with them.

- Workers can see the shared goals in the HR Goals subsection of the Goals Shared With Me section of their Goals page. They can add the goals to their goal plans if they want to. They can add these HR shared goals to the goal plan even if the goal plan already has the maximum limit of goals. They can align their goals to these shared goals.

Related Topics
- How You Manage Goals Shared With You
- Submit Scheduled Processes and Process Sets

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10 Goal Plans

Goal Plans

Goal plans are a collection of performance goals grouped by common characteristics. For example, a specified time frame and a particular department that must work on them. Depending on security privileges assigned to your role, you can create goal plans.

Manage Goal Plans

Use the **Goal Plans** link on the administrator Goals page to view the Goal Plans overview page.

> **CAUTION:** To manage goal plans, go to **My Client Groups** > **Goals**. Don't use the **Goal Plans** task in the Functional Setup Manager.

By default, you can see the goal plans for the review period with the latest start date Goal Plans overview page. You can do these actions:

- Edit a goal plan.

- Delete a goal plan.

- Change the status of an existing goal plan to inactive.

  > **Note:** Inactive goal plans aren't available for use and don't appear on the application pages.

Primary Goal Plan

You can use the primary goal plan to create a common goal plan for all review periods. The primary goal plan feature is available only if you haven't enabled the goal plan set feature. When you navigate to the Goal Plans page, you can see the Primary Plan section. The primary goal plan, if available, is displayed in this section. You don't need to assign the primary goal plan to any worker. When you make a primary goal plan active, it's available to all users in all review periods.

Assign Goal Plans

You need to assign goal plans other than the primary goal plan to an employee before you can you can add or assign goals to the employee within the goal plan duration. Use the **Scheduled Processes for Performance Goals** link on the on the administrator Goals page to schedule a process that will assign goal plans.

Related Topics
- Mass Assignment of Performance Goals
- Overview of Performance Goals Scheduled Processes
- Guidelines for Loading Goal Plans

Primary Goal Plan

A primary goal plan is a common goal plan that's available to all users for all review periods. You can have only one active primary goal plan for an organization.

A primary goal plan has these features:

- All users can update a primary goal plan.

- Weights are enabled by default for a primary goal plan.

- By default, the enforce sum of goal weights to 100% is disabled. But you can enable this.

- You can select the primary goal plan when using the **Add Performance Goal** action or mass assigning goals. But you can't add goals to a primary goal plan when you create or edit it.

- You can't specify any eligibility profile for a primary goal plan.

Primary Goal Plan and Goal Integrations

Other offerings can use primary goal plan in these ways:

- When a primary goal plan is active, performance goals added in a Talent Review meeting are automatically added to the primary goal plan of the selected review period.

- These rules apply for goals included in performance documents available in responsive Performance Management:

  o If the primary goal plan is associated with the document type used for a performance document template, then when the administrator creates a responsive performance document based on that template, a primary goal plan is created for that review period. A primary goal plan need not be associated with the review period of the performance document.
  o Goals in the performance template of the performance document are added to the primary goal plan.
  o If the primary goal plan is associated with the document type used for the performance template, then when you copy goals from a performance document, they're added to the primary goal plan.

Related Topics
- How Performance Documents Work with Performance Goals

How You Create Goal Plans

As an administrator, you create goal plans on the Goal Plans page.

Go to **My Client Groups** > **Goals** > **Goal Plans** to view the Goal Plans page.

Update your person information before you try to create goal plans. Person information determines goal plan security and is used to update attributes such as the person who assigned the goal plan.

> **Note:** The instructions in this topic apply only for regular goal plans and not for primary goal plans. You create a primary goal plan in the Primary Plan section of the Goal Plans page. You can see this section only if the goal plan set feature isn't enabled.

Review Period and Goal Plan Active Dates

You need to associate a review period with a goal plan when creating the goal plan. You also need to specify goal plan start and end dates.

Goal Weights

A goal weight indicates the relative importance of each goal in the goal plan. When creating a goal plan, you can enable entering weights for the goals in the plan. You can further ensure that the sum of all goal weights in the goal plan is 100%. You can assign a weight to each goal included in the goal plan. Managers and workers can later modify the weight for each goal for a goal plan.

Maximum Goals

You might want to restrict the number of goals in the goal plan. To do this, specify a value in the **Maximum Goals for This Goal Plan** field. If you don't specify any value, then workers can add an unlimited number of goals to the goal plan.

> **Note:** The restriction doesn't apply when adding organization goals.

After you specify the maximum number of goals in a goal plan, you can also impose other restrictions using these settings:

- **Enforce maximum goals**: Use this to prevent managers and HR specialists from assigning any goals when the goal plan has the maximum number of goals.

- **Allow private goals to exceed maximum goal limit**: Use this when private goals are enabled to allow employees to add private goals to the goal plan even when the goal plan has the maximum number of goals.

  > **Note:** The **Allow private goals to exceed maximum goal limit** check box is disabled if your administrator hasn't enabled private goals for your organization using Transaction Design Studio (TDS).

Employees Who Can Update Goals

Select one of these options to indicate who can update the goals in the goal plan:

- Only the HR specialist

- HR specialist and manager

- HR specialist, manager, and worker

You can also indicate what actions managers and workers can perform on goals assigned by the HR specialist.

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Permissible Actions for Workers and Managers on Assigned Goals

You can determine if managers and employees can cancel or delete goals that have been assigned by HR specialists. You can allow managers and employees to do one of these actions on goals assigned by an HR specialist:

- Only cancel
- Only delete
- Both cancel and delete

Performance Document Types

Select document types to associate with the goal plan. Goals from the goal plan are included in performance documents that use the selected document types and have the same review period.

You can associate a performance document type with a goal plan only if these conditions are true:

- The **From Date** of the performance document type needs to be the same as or before the start date of the goal plan. For example, if the start date of the goal plan is April 15, 2022, then the **From Date** of the performance document type must be April 15, 2022 or earlier, such as January 1, 2022.
- The **To Date** of the performance document type needs to be the same as or later than the end date of the goal plan. For example, if the end date of the goal plan is December 30, 2022, then the **To Date** of the performance document type must be December 30, 2022 or later, such as January 15, 2023.
- The status of the performance document type needs to be **Active**.

  Note: After a performance document type is used by a performance template or a goal plan, you can't set it to **Inactive**.

Add Goals

You can create goals or select goals from a goal library and add them to the goal plan. Goals added to the plan are assigned to the people to whom the plan is assigned.

Workers to Assign

You can add eligibility profiles to goal plans to assign goals included in the plan to individuals who meet the criteria of all profiles that you indicate are required profiles. You can restrict goals to workers who meet eligibility requirements by job, job role, location, age, or other criteria. For example, you can add a location eligibility profile to a goal plan if you want to restrict goals to individuals who are located in a certain place. You can further refine eligibility by adding length of service criteria to restrict workers by location and length of service.

In the Included Workers section, you can select the employees for assigning goals in the goal plan. After selecting the employee, you can assign the goals to any of these people:

- Only the selected employee
- Only people who directly report to the selected employee
- All people who report to the selected employee
- Only the selected employee and the people who directly report to the selected employee
- The selected employee and all the people who report to the selected employee

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In the Excluded Workers section, you can select the employees who won't be assigned the goals in the goal plan.

> **Note:** HR specialists can select any employee in the organization for goal assignment or exclusion even if they don't have access to the employee.

Related Topics
- Can I verify a person's eligibility to assign a goal plan or goal plan set?
- Eligibility Profiles

How You Assign Goal Plans

When you create a regular goal plan, the goals in the goal plan aren't automatically assigned to the workers included in the goal plan. You need to run a scheduled process to assign the goals.

How to Assign Goal Plans

Here's how you assign goal plans:

1. Use the **Scheduled Processes for Performance Goals** link available in the administrator's Goals landing page.
2. Select the **Assign goal plans** process type.
3. Select the goal plan name as the process name.
4. Submit the process.

What Happens When Multithreaded Batch processing Is Enabled

If the profile options for multithreaded batch processing of goal plans have been set up, multiple child processes are created to assign loose goal plans. The parent process remains in the paused state until the child processes complete. The number of child processes (or threads) created and the assignees in each process depends on the values that are specified for these profile options:

- HRG_GP_MAX_THREADS
- HRG_GP_MINCOUNT_EACHTHREAD
- HRG_GP_MINCOUNT_LASTTHREAD

This table indicates the default value of these profile options and what you need to remember when you specify a value for these profile options.

Profile Option	Description	Default Value	Points to Remember
HRG_GP_MAX_THREADS	Specifies the maximum number of threads for each batch process that assigns goals of a goal plan.	4	• If the value of this profile option is set to 0 or 1, only a single-threaded process is created. • This profile option value can't exceed 8. If it exceeds 8, the

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Profile Option	Description	Default Value	Points to Remember
			profile option value is reset to the default value 4.
HRG_GP_MINCOUNT_EACHTHREAD	Specifies the minimum number of assignments required for each thread of the multithreaded batch process.	5000	We recommend not to change the default value.
HRG_GP_MINCOUNT_LASTTHREAD	Specifies the minimum number of assignments required for the last thread of the multithreaded batch process.	1000	We recommend not to change the default value.

The value set for the HRG_GP_MAX_THREADS profile option only specifies the maximum number of threads. The actual number of threads to create is dynamically determined based on the values set for HRG_GP_MINCOUNT_EACHTHREAD and HRG_GP_MINCOUNT_LASTTHREAD profile options.

The assignments in each thread other than the last thread = Total number of goal plan assignees/Total number of threads

For example, let's assume that these values are assigned to the three profile options.

- **HRG_GP_MAX_THREADS**: 5
- **HRG_GP_MINCOUNT_EACHTHREAD**: 5000
- **HRG_GP_MINCOUNT_LASTTHREAD**: 1000

Let's also assume that the number of people to whom the goal plans must be assigned is 20500. In this case, 4 child processes are created. The assignments done in each child process other than the last one is 5000. The last child process assigns goals in the goal plan for the remaining 5500 people.

What Happens After the Scheduled Process Completes

Here's what happens when you run the process for a new goal plan, rerun the scheduled process for an existing goal plan, or edit a goal plan and then rerun the process:

- Any new workers selected in the goal plan are assigned the included goals.
- Any new goals included in the goal plan are assigned to the selected workers.
- Any goals included in the goal plan, but already assigned to the selected workers remain assigned. There are no changes to such goals for the selected workers.
- Any goals included in the goal plan assigned earlier to any workers excluded later from the goal plan remain assigned to them. There are no changes to such goals or goal plans for the excluded workers. You must manually remove the goal from the goal plan for any workers included in any earlier submissions.

Related Topics
- Goal Management Profile Options

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Add Goals to a Goal Plan

Depending on your security privileges and role, you can add performance goals to goal plans.

You can add performance goals on any of these pages:

- A goal plan page
- A worker's Goals page
- A report's Goals page
- Goal and Performance Overview page
- Mass assignment process page

How You Add Goals

This table describes how you can add goals to a goal plan from various Goal Management pages.

Page	Steps to Add a Goal	Comments
A goal plan page	1. Click **My Client Groups** > **Goals** > **Goal Plans**. 2. Search for goal plans by selecting the review period and a worker's or manager's name. 3. Click the name of a goal plan to edit it or add a goal plan. 4. In the Goals section, add a library goal or create a goal.	You need to run the **Assign goal plans** scheduled process to assign the goals added.
A worker's Goals page	1. Click **Me** > **Career and Performance** > **Goals**. 2. Select a review period. 3. Select a goal plan set if you have enabled it. 4. Select a goal plan. 5. Click **Add**. 6. On the Add Goal page, select a library goal or enter the goal name to create a goal. 7. Enter goal details and save the goal.	You can add goals only to those goal plans that are assigned to you.
A report's Goals page	1. Click **My Team My Team**. Search and click a person's name. On the person's person spotlight page, click the **Goals** tab. 2. Select a review period. 3. Select a goal plan set if you have enabled it. 4. Select a goal plan. 5. Click **Add**. 6. On the Add Goal page, select a library goal or enter the goal name to create a goal. 7. Enter goal details and save the goal.	• On the Goals page, you can add goals to only those goal plans that are assigned to your report • You need to run the **Assign goal plans** scheduled process to assign the goals added.

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Page	Steps to Add a Goal	Comments
Goal and Performance Overview page	1. Click **My Team** > **Performance Overview**. 2. Select a review period. 3. Select the persons to whom you want to add a performance goal. 4. Click **Add Performance Goal**. 5. For each employee, select the goal plan to which you want to add a goal. 6. To allow the employee to update the key attributes, select the check box. 7. Select a library goal or enter the goal name to create a goal. 8. Enter goal details and save the goal.	You can add goals only if a goal plan is assigned to the persons selected for the review period.
Mass assignment process page	1. Click **My Client Groups** > **Goals** > **Setup of Performance Goals Mass Assignment**. 2. Edit or add a mass assignment process. 3. Select review period and goal plan. 4. If you're creating the process for another manager, select the requester's name. 5. Select the employees to assign the goals to. 6. In the Goals section, if you haven't added a requester, add existing library goals or create goals. When you add a requester, you can select and add the requester's goals. 7. Click **Save and Close**.	You need to run the **Mass Assign Goals** scheduled process to assign the goals to the workers selected.

Related Topics
- How You Create Goal Plans

Import Goals from Goal Plan

This topic describes how to import goals from another goal plan.

Sometimes you might want to add goals that are very similar to existing goals in another goal plan. You can import goals from a source goal plan to the goal plan you're working on. You need to use the **Import** action to do this.

> **Note:** The start and end dates of the goal plan into which you want to import the goals must be within the start and end dates of the source goal plan.

1. Open the goal plan.
2. Expand the Goals section.
3. Click **Actions** > **Import**.
   You can see the Import Goals page.
4. Select the review period in which you can find the source goal plan.
5. Select the source goal plan from which you want to import goals.

6. Click **Save and Close**.

How You Enforce Maximum Goals for a Goal Plan

Your organization may want to set a maximum limit for performance goals that workers, managers, and HR specialists can add to specific goal plans. They may want workers to focus on their core performance goals.

When you define or edit a goal plan, specify the maximum number of goals that the goal plan can have in the **Maximum Goals for This Goal Plan** field. If you don't specify any value, then there's no limit on the number of goals that a worker can have in a goal plan.

After you specify the maximum number of goals in a goal plan, you can also impose other restrictions using these additional settings:

- **Enforce maximum goals**: If selected, then managers and HR specialists can't assign any goals when the goal plan has the maximum number of goals. If not selected, managers and HR specialists can override the maximum goal setting and assign goals.

- **Allow private goals to exceed maximum goal limit**: If selected and when private goals are enabled, employees can add private goals to the goal plan even when the goal plan has the maximum number of goals.

  > **Note:** The **Allow private goals to exceed maximum goal limit** check box is disabled if your administrator hasn't enabled private goals for your organization using Transaction Design Studio (TDS).

These additional settings apply only for new goal plans and not for existing goal plans. So, users won't see any error or warning message if you edit an existing goal plan and select either the **Enforce maximum goals** check box or the **Allow private goals to exceed maximum goal limit** check box.

Effect of Allow private goals to exceed maximum goal limit Setting

When a user performs some actions, such as **Add** or **Copy**, on a goal plan that has a maximum limit specified, the number of goals in the goal plan may exceed the limit. This table lists the results of actions performed on goals based on the **Allow private goals to exceed maximum goal limit** setting.

Action	Done By	Result when the Allow private goals to exceed maximum goal limit check box is selected	Result when the Allow private goals to exceed maximum goal limit check box is cleared
- Add - Copy	Worker	When private goals are enabled, the worker sees a warning message indicating that the goal added or copied will cause the count of the goals to exceed the specified limit. The goal is added as a private goal.	The worker sees an error message indicating that the goal plan has the maximum allowed goals.
- Extend - Move	Worker	The worker sees an error message indicating that the goal plan has the maximum allowed goals. The goal isn't extended or moved to the target goal plan.	The worker sees an error message indicating that the goal plan has the maximum allowed goals. The goal isn't extended or moved to the target goal plan.

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Action	Done By	Result when the Allow private goals to exceed maximum goal limit check box is selected	Result when the Allow private goals to exceed maximum goal limit check box is cleared
Add colleague shared goal	Worker	When private goals are enabled, the worker sees a warning message indicating that addition of the shared goal will cause the count of the goals to exceed the specified limit. But the goal is added as a private goal.	The worker sees an error message indicating that the goal plan has the maximum allowed goals.

Effect of Enforce maximum goals Setting

This table lists the results of actions performed on goals based on the **Enforce maximum goals** setting.

Action	Done By	Result when the Enforce maximum goals check box is selected	Result when the Enforce maximum goals check box is cleared
• Add organization goal • Add manager shared goal • Add HR shared goal	Worker	The worker sees an error message indicating that the goal plan has the maximum allowed goals.	No error message is displayed. The goals are added to the goal plan.
• Add • Copy • Extend • Move	Manager or HR specialist	The manager or HR specialist sees an error message indicating that the goal plan has the maximum allowed goals.	No error message is displayed. The goals are added to the goal plan.
Assign	Manager or HR specialist	The HR specialist sees an error message in the log file indicating that the specified goal plan limit has been reached. The administrator has access to a log file that lists the employees whose goal plans have met the maximum goals and therefore weren't assigned the goal.	No error message is displayed. The goals are added to the goal plan.
Mass assignment of performance goals	HR specialist	The HR specialist sees an error message in the log file indicating that the specified goal plan limit has been reached. The administrator has access to a log file that lists the employees whose goal plans have met the maximum goals and therefore weren't assigned the goal in the mass assignment.	No error message is displayed. The goals are added to the goal plan.

Goal Plan Sort Options

Sort goals in a goal plan and find the goals that you want to work on first. Your administrator can show or hide the different sort options according to the business needs.

You can sort goals by these attributes:

- Display sequence
- Goal name
- Weight
- Goal status
- Completion percentage
- Last update date
- Target completion date
- Goal priority
- Goal category

Note: The sort options for goal name and last update date are visible by default.

Display Sequence

You can specify the sequence in which you want to see the goals in a goal plan that you can access. Use the **Edit Sequence** action to do this. On the Display Sequence page, order the goals in the sequence you want them to display in the goal plan.

Note: The **Edit Sequence** action is disabled if approvals are pending for the goal plan or if the goal plan is in draft state

If your administrator has enabled sorting goals in a goal plan by display sequence, then that's the default sort order. Here's what happens after you specify the display sequence:

- The goals in the goal plan show in the specified display sequence until the sequence is changed. Any user who can access the goal plan can change the display sequence.
- The goals show in the specified display sequence in all goal navigation flows regardless of who set the sequence. So, the employee who's assigned the goal, the employee's manager, and the HR specialist will see the goals in the same sequence.

Goal Name and Goal Category

You can view goals in a goal plan arranged alphabetically by their name either in the ascending order or the descending order. Similarly, you can also sort goals alphabetically by their category either in the ascending order or the descending order.

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Weight

You can see the weight related sort options only if weights are enabled for the goal plan. You can sort goals in the goal plan either in the ascending order of their weights or the descending order.

Goal Status

When you sort goals by their status, the goals display in this order:

1. Not Started
2. In Progress
3. Completed
4. Canceled

Completion Percentage

You can see the completion percentage sort options only if your administrator has enabled the **Completion Percentage** attribute in the Basic Info section of the goal. You can sort goals in the goal plan either in the ascending order of their completion percentage or the descending order.

Date Sort Options

You can sort goals by their target completion date or the date they were last updated. You can opt to view goals that have the latest date first or those with the oldest date first.

Goal Priority

You can see the priority sort options only if the **Priority** attribute is enabled for goals. You can opt to view goals that have a high priority first or those that have a low priority first.

Related Topics
- How You Configure Goal Management Pages Using Transaction Design Studio

FAQs for Goal Plans

How can I create goal plans for people who are new to the organization?

Depending on your role and security privileges, you can either add individuals to an existing goal plan, or create a new goal plan and assign it to individuals who are new to the organization.

If you add new performance goals to an existing goal plan, the new goals are assigned to all employees assigned the goal plan. Note that any goals included earlier in an existing goal plan but already assigned to any selected workers remain assigned. Similarly, if you remove any workers included earlier in the goal plan and resubmit the process to assign the goal plan, the goal and the goal plan remain assigned to the excluded workers.

Related Topics
- How You Create Goal Plans

How can I delete a goal plan?

You can delete a goal plan that isn't assigned to any workers. However, you can't delete an assigned goal plan, worker or organization. You can only change the status of an assigned goal plan to either active or inactive.

Inactive goal plans aren't available for use and don't appear on the application pages.

What's the difference between extending a goal and moving a goal to another goal plan?

When you move a goal to another goal plan, the goal is no longer associated with the source goal plan. For example, you move a goal to another goal plan when you want to associate the goal with a different performance document.

When you extend a goal to another goal plan, the goal is associated with both source and target goal plans. Except for the goal weight, any changes to the goal are visible in both the source and target goal plans after you extend the goal. For example, if you couldn't complete a goal before the end date of the source goal plan, you extend the goal to another goal plan to continue working on the goal for an extended duration.

How can I extend a goal to another goal plan?

If you haven't completed a performance goal, you can extend it to another review period.

1. On the Goals page, select the review period and the goal plan the goal is associated with.
2. Select the **Extend** action for the goal.

   You can see the Extend Goals page.
3. Select the review period and the goal plan to which you want to extend the goal.
4. Click **Save and Close** to save your changes.

How can I move a goal to another goal plan?

To move a goal on your Goals page or your report's Goal page, select the review period and the associated goal plan. Then select the **Move** action for the goal.

You can see the Move Goals page. Select the review period, the goal, and the goal plan to which you want to move the goal. Click **Save and Close** to save your changes.

Why can't I update my goal plan?

You can't update goal plans that are pending approval. If approval is required, any goal or goal plan changes you make aren't final until approval is granted for the associated goal plan.

When do I get notifications for feedback requests sent for performance goals?

This table lets you know when to expect notifications for feedback requests and who receives them.

When notification is sent	Who's notified
Employee requests feedback for their performance goal	• The people included in the request • The manager of the employee if the employee opted to share the feedback with the manager
Manager requests feedback for the performance goal of a team member that the manager can update	• The people included in the request • The employee if the manager opted to share the feedback with the employee
A person provides feedback for a performance goal	• The employee or manager who requested feedback for the goal • The manager of the employee who requested feedback for the goal if the employee opted to share the feedback with the manager • The employee who's assigned the goal if the manager opted to share the feedback with the employee
The HR specialist asks the feedback provider to revise the feedback	• The person who's asked to revise the feedback provided • The employee or manager who requested feedback for the goal • The manager of the employee who requested feedback for the goal if the employee opted to share the feedback with the manager • The employee who's assigned the goal if the manager opted to share the feedback with the employee
A person revises feedback for a performance goal	• The HR specialist who sent the feedback revision request • The employee or manager who requested feedback for the goal • The manager of the employee who requested feedback for the goal if the employee opted to share the feedback with the manager • The employee who's assigned the goal if the manager opted to share the feedback with the employee
The HR specialist deletes the feedback provided	• The person who provided the feedback • The employee or manager who requested feedback for the goal • The manager of the employee who requested feedback for the goal if the employee opted to share the feedback with the manager

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When notification is sent	Who's notified
	• The employee who's assigned the goal if the manager opted to share the feedback with the employee

How are performance goals in Goal Management synchronized with those added to performance documents?

The **Evaluation Type** attribute of goal plans is used to sync performance goals in Goal Management with those included in performance documents.

When users create a performance document, goal plans that have the same evaluation type as that defined in the performance template are automatically added as evaluation topics.

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11 Goal Plan Sets

Goal Plan Sets

Goal plan sets are one or more goal plans that you assign as a group to a population set. The goal plans and the goal plan set must be associated with the same review period.

Depending on your role and security privileges, you can create goal plan sets. Use the **Goal Plan Sets** link on the administrator Goals page to create goal plan sets. You can enable goal plan sets using the **Goal Plan Sets Enabled** profile option

These are the advantages of using goal plan sets:

- You can group goal plans to evaluate the overall progress and performance of a worker.

- You can assign specific goal plans with relative weights to a specific population.

Goal Plan Grouping and Tracking for Specific Periods

HR specialists create goal plan sets for a review period to:

- Group goal plans within the same review period to assign them to a group of individuals

- Track worker performance for the period of the goal plan set

Associate goal plans with a goal plan set before submitting a goal plan set for assignment. The start and end dates of the review period associated with goal plans must fall between the dates that the goal plan set is active.

Relative Weights for Goal Plans for Specific Populations

When creating a goal plan set, you can allocate weight to each goal plan so the sum of weights of all goal plans is 100, if enabled. You can assign goal plans to individuals, a selected hierarchy, or a wider population within the organization. You can select eligibility profiles at any time. Use eligibility profiles to ensure that the goal plan set is assigned to all individuals who meet the eligibility criteria. You must add goal plans to the goal plan set before you submit the goal plan set for the goals assignment. You can select existing goal plans or create a goal plan.

After you submit and assign a goal plan set, you:

- Can't remove or add goal plans to the goal plan set.

- Can remove or add individuals and eligibility profiles to the goal plan set at any time.

Note: You can't delete an assigned goal plan set. However, you can delete an unassigned goal plan set.

Related Topics
- Goal Management Profile Options

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Guidelines for Creating Goal Plan Sets

You can use goal plan sets to group performance goal plans for evaluating the overall progress and performance of a worker.

Assign specific goal plans with relative weights to a specific population. Depending on your role and security privileges, you can create goal plan sets. Use the **Goal Plan Sets** link on the administrator Goals page to create goal plan sets.

> **Note:** The **Goal Plan Sets** link is displayed only when the **Goal Plan Sets Enabled** profile option is set to **Y**. To set the value of the profile option, use the **Worker Goal Setting Profile Option Values** task in the Setup and Maintenance work area.

A goal plan can be associated with multiple goal plan sets if a goal plan set and the goal plan are associated with the same review period.

To create goal plan sets, you must decide:

- Dates that a goal plan set is active
- The individuals to whom to assign the goal plan set and whether to add eligibility profiles
- Which goal plans to add to the goal plan set
- How much weight to allocate to the included goal plans
- When to schedule the assignment of the goal plan set

Select Review Period and Goal Plan Set Active Dates

You must select a review period such that the start and end dates for the goal plan set fall within the review period. Use review periods to determine which goal plans are eligible to belong to a goal plan set. Active goal plans with a review period that's the same as that of the goal plan set can belong to the set.

Add Goal Plans to the Goal Plan Set

When creating a goal plan set, you can create a goal plan and add it to the set. Or you can search for and select from existing active goal plans that have the same review period and add them to the set.

Allocate Weights to the Goal Plans

Allocate weight to each goal plan included in the goal plan set so the sum of weights of all goal plans is 100, if enabled. A goal plan weight indicates the relative importance of each goal plan. Other Oracle Fusion Applications products can consume these weights in their processes. For example, the incentive compensation plan can use these weights and the worker's actual achievement of the goal objectives, to calculate the worker's incentive pay.

Assign the Goal Plan Set

You assign goal plan sets to a selected hierarchy or individuals when creating the goal plan set or at a later time. You can also exclude specific assignees reporting to a manager. When assigning more than one goal plan set to an individual, if the review periods overlap, then the newly assigned goal plan set is set to the pending status. The goals and goal plans included in the pending goal plan set aren't assigned to the worker until the goal plan set status is set to active.

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After you submit a goal plan set for assignment, you can add or remove individuals, and then resubmit the set for assignment.

Add eligibility profiles to a goal plan set to ensure goal plans added to the goal plan set are assigned to individuals who meet the criteria of all required profiles. For example, you can add a location eligibility profile to a goal plan set to assign goal plans to individuals who are located in certain place. You can further refine eligibility by adding length of service criteria to restrict workers by location and length of service.

Schedule the Assignment of the Goal Plan Set

After you save and close a new goal plan set on the Goal Plan Sets page, you must submit the goal plan set for assignment. You submit a goal plan set for assignment on the Scheduled Processes for Performance Goals page.

1. Select **Assign goal plan sets** as the **Process Type**.
2. Select the goal plan set you want to assign as the **Process Name**.
3. In the Advanced Options, you can select if you want to run the process as soon as possible or use a schedule.
4. Submit the process.

After the process is complete, the goal plans included in the goal plan set are assigned to all individuals who were selected in the goal plan set. The population settings selected at the individual goal plan level aren't used during the assignment of goal plan sets.

If you rerun the process for an existing goal plan set, edit a goal plan set and then rerun the process, or submit a new goal plan set:

- New workers selected in the goal plan set are assigned the included goal plans and associated goals within the goal plan.

- New goal plans included in the goal plan set are assigned to the selected workers.

- Goal plans included in the goal plan set, but already assigned to the selected workers remain assigned. There are no changes to such goal plans for the selected workers.

- Goal plans included in the goal plan set and assigned earlier to any workers excluded later from the goal plan set remain assigned to them. There are no changes to such goals or goal plans for the excluded workers. You must manually remove the goal from the goal plan for any workers included in any earlier submissions. You can't delete a goal plan assigned to a worker.

Related Topics
- How You Use Eligibility Profiles when Assigning Performance Goals
- Overview of Performance Goals Scheduled Processes
- Goal Management Profile Options

Change the Weight of a Goal Plan in a Goal Plan Set

HR specialists can change the weights of goal plans included in a goal plan set for a worker.

To change the weight of a performance goal plan included in a goal plan set for a worker, follow these steps:

1. Go to **My Client Groups** > **Goals**. The administrator Goals page appears.
2. Select the **Worker Goal Plan Sets** link.
3. Search for the goal plan set associated with the worker.

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4. Click the link to the goal plan set in the Search Results table.
5. Select the row for the goal plan set in the workers goal plan set page.
6. From the Actions menu, select **Change Goal Plans Weight**. The dialog box with the name of the goal plan set appears.
7. Update the weight for the goal plan and click **OK** to close the dialog box. The updated weight of the goal plan appears in the page table.

> **Note:** The goal plan set enforces the sum of weights of the included goal plans to total 100. Therefore, adjust the weight of remaining goal plans in the set such that their sum is 100. If there is only one goal plan in the set, the weight of that goal plan must be 100.

8. Click **Done** to return to the administrator Goals page.

Related Topics
- Goal Plans
- Goal Plan Sets
- How You Resolve Conflict in Dates for Goal Plan Sets Due to Transfer

How Effective Dates of Goal Plan Sets Are Assigned

The application-assigned effective date of a goal plan set depends on when the worker is assigned the goal plan set.

The effective dates of the goal plans included in the goal plan set are automatically updated to the application-assigned goal plan set effective dates.

The following table describes scenarios in which a goal plan set is assigned to a worker and the application-assigned effective dates of the goal plan set.

Scenario	Effective Dates of the Goal Plan Set for the Worker Is
The worker is assigned the goal plan set before the beginning of the goal plan set duration.	As included in the goal plan set.
The worker is assigned the goal plan set because of a transfer.	Derived from the date on which the worker becomes eligible for the goal plan set after the worker's transfer. A conflict might occur between the active dates of goal plan sets because of a worker's transfer. You must manually change the effective dates of goal plan sets for the worker and resolve the conflict. Use the Administer Goals page in the Goals work area to change the dates. Depending on your role and security privileges, you can access the Administer Goals page.
The worker is assigned the goal plan set because the worker is a new hire and was hired in the middle of the goal plan set duration.	Derived from the date on which the newly hired worker becomes eligible for the goal plan set. The effective start date of the goal plan set for the worker is later than the start date of the goal plan set.

Related Topics

- Goal Plan Sets
- Guidelines for Creating Goal Plan Sets
- Change the Weight of a Goal Plan in a Goal Plan Set
- Examples of Changing Effective Dates of Goal Plan Sets
- How You Resolve Conflict in Dates for Goal Plan Sets Due to Transfer

How You Resolve Conflict in Dates for Goal Plan Sets Due to Transfer

A conflict can occur between the dates of the goal plan sets because of a worker's transfer.

When the conflict occurs, the dates of the existing goal plan sets remain same as they were defined. However, the goal plan set that's assigned to a worker post transfer is set to the pending status. The goals and goal plans included in the pending goal plan set aren't assigned to the worker until the goal plan set status is set to active.

HR specialists can change the effective dates of the pending goal plan set for the worker and resolve the conflict.

Select the **Worker Goal Plan Sets** link on the administrator Goals page. Then search for the goal plan set and then select the **Change Dates** option from the **Actions** menu to change the date of a goal plan set.

Related Topics

- How Effective Dates of Goal Plan Sets Are Assigned
- Change the Weight of a Goal Plan in a Goal Plan Set
- Examples of Changing Effective Dates of Goal Plan Sets

Examples of Changing Effective Dates of Goal Plan Sets

Depending on your role and security privileges, you can change the dates of goal plan sets for a worker on the Worker Goal Plan Sets page. These scenarios illustrate typical reasons for changing effective dates of the goal plan sets for a worker.

Change Effective Dates of a Goal Plan Set for a Worker

Daniel Grayson, a worker in ABC Corporation, has this goal plan set assigned.

Goal Plan Set	Start Date	End Date
FY2022 Finance-UK	April 01, 2022	March 31, 2023

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John Gorman, Daniel's line manager, wants to extend the duration of the goal plan set for Daniel until December 31, 2023. Ellis Gibson is an HR specialist who has security privileges to manage goal plan sets. John asks Ellis Gibson to change the effective end date of the goal plan set to December 31, 2023. Ellis searches for and then selects the FY2022 Finance-UK goal plan set on the **Worker Goal Plan Sets** page. Ellis then uses the **Change Dates** option from the **Actions** menu to change the dates.

Change Effective Dates of Goal Plan Sets After a Worker's Transfer

Sonia Jalla, a worker from the US division of ABC Corporation, has this goal plan set assigned to her.

Goal Plan Set	Start Date	End Date
FY2022 Annual-US	April 01, 2022	March 31, 2023

She is scheduled to transfer to the UK division on October 9, 2022. The workers included in the UK division are automatically assigned the following goal plan set.

Goal Plan Set	Start Date	End Date
FY2022 Annual-UK	April 01, 2022	March 31, 2023

Post transfer, Sonia is eligible for the goal plan set FY2022 Annual-UK. There's a conflict between the end date of the before transfer goal plan set, FY2022 Annual-US, and the start date of the post transfer goal plan set, FY2022 Annual-UK. The application sets the status of the goal plan set FY2022 Annual-UK to pending and sends the notification about the date conflict to Ellis. Ellis uses the **Change Dates** option from the **Actions** menu on the **Worker Goal Plan Sets** page. Ellis changes the start and end date of the goal plan set assignment and assigns both the goal plan sets with the updated effective dates.

Related Topics
- How Effective Dates of Goal Plan Sets Are Assigned
- How You Resolve Conflict in Dates for Goal Plan Sets Due to Transfer
- Guidelines for Creating Goal Plan Sets

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12 Goal Library

Goal Library

The goal library is a repository of reusable goals that you create and maintain to manage the enterprise goal-setting process efficiently. HR specialists create these library goals. Users can add these library goals in the Goal Management, Performance Management, and Talent Review work areas.

Use the goal library to define goals consistently and reduce the effort of creating a new goal if similar goals already exist. The goal library is part of the content library of Talent Profiles. Organization owners, managers, and workers can search the goal library to copy the goals. Managers and HR specialists can assign library goals through goal plans in the Goal Management work area, to a selected population. HR specialists can also select library goals while mass assigning goals. To add goals from the goal library, organization owners, managers, and workers can search for goals using different criteria such as goal name, and category.

> **Note:** In the drill-down mode, you can also search a library goal by legal employer, business unit, department, job family, and goal subtype. Your administrator needs to configure the search parameters to include these values. An administrator can use these filter attributes to configure the library goal search in the drill-down mode:
> - **Goal Name**: Name
> - **Category**: GoalCategory
> - **Subtype**: GoalSubType
> - **Legal Employer**: GoalLegalEntityName
> - **Business Unit**: GoalBusinessUnitName
> - **Department**: GoalDepartmentName
> - **Job Family**: GoalJobFamilyName

To search for goals in the goal library, your role needs to have the **Use REST Service - Performance Goals List of Values** function security privilege.

HR specialists and administrators can use the **Performance Goal Library** link on the administrators Goals page to add a performance goal to the goal library.

> **CAUTION:** To manage the goal library, go to **My Client Groups** > **Goals**. Don't use the **Goal Library** task in the Functional Setup Manager.

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On the Performance Goal Library page, HR specialists and administrators can do these tasks:

- Add library goals.

- Edit library goals.

- Search for goal libraries by using filters such as Status, Available To, Legal Employer, Business Unit, Department, and Job Family.

  > **Tip:** You can add other search filter attributes such as Priority, Level, Subtype, Start Date, Target Completion Date, and External ID to your search by using the Personalize Filters icon.

- Edit library goal translations in the supported languages by using the **Edit Goal Translation** Actions menu item.

- Delete an existing library goal that isn't used anywhere.

Set the Library Goal Status

When the status of a goal is **Active**, it's available to copy. You can set the status of a goal to **Inactive**, even if workers have copied the goal and are currently using it. If you change the status of the goal to inactive, then it's no longer available for copying. You can make the goal inactive, for example, to edit it, then restore it to **Active** status to make the edited goal available again.

Decide Who Can Access the Library Goal

When you edit or add a library goal, you select whether to make the goal available to a role. By default, all roles have access to the goal. You can decide whether to give access to the goal only to HR specialists, or also include managers and workers.

Related Topics
- Overview of Profile Management
- Talent Review
- Modify UI Components Using Page Composer

How You Create Library Goals in Goal Management

HR specialists create library goals for Oracle Fusion Cloud Goal Management on the Performance Goal Library page.

Use the **Add** button available on the Performance Goal Library page to create a library goal. When you copy a goal from the library, you can change the goal attributes as appropriate. The Add Goal page has different sections for adding the library information and the goal's basic information.

You can specify these values in the Library Info section:

- Status

  > **Note:** The default status is **Inactive**.

- Business Unit, Department, Legal Employer
- Job Family

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> **Note:** You can also assign a weight for the goal. The weight field is hidden by default.

You can use the External ID attribute to refer to a performance goal in external applications. This attribute value is either application-generated or user-defined based on the application configurations.

In the Basic Info section, you can specify attributes such as name, description, success criteria, and target completion date. In addition to the goal category, you can also decide the subtype of a goal. A subtype is a method for further classifying a goal. Subtypes are configured based on business requirements.

If the value of the **HRG_ENABLE_TASK** profile option is **Yes**, you can add tasks to a performance goal. By default, you can add multiple measurements in the Add Goal page. Administrators need to change the value of the **HRG_USE_MEASUREMENTS** profile option to disable this or add only a single measurement.

You can add target outcomes only if all these conditions are true:

- The value of the **HRG_ENABLE_OUTCOMES** profile option is **Yes**.
- The value of the **HRG_ENABLE_GOAL_DRILLDOWN_VIEW** profile option is **Yes**.
- Your organization has migrated to Enhanced Talent Profiles.
- The value of the **HRG_GOALS_RESPONSIVE_ENABLED** profile option is **Y**.
- The value of the **HRD_CAREER_DEVELOPMENT_RESPONSIVE_ENABLED** profile option is **Y**.

Related Topics
- Goal Management Profile Options

How You Edit Library Goals in Goal Management

The goal library is a repository of reusable goals for Oracle Fusion Cloud Goal Management. As HR specialists, you might need to update these library goals sometimes.

You can edit a goal in the goal library at any time, regardless of whether people in your organization have already copied the goal. Changes that you make to goals in the library don't affect those that have been copied and are in current use. This is because there's no link between the two versions of the goal. Note that you can't edit the external ID of a goal.

You can edit a goal in drill-down mode or inline mode depending on whether you have enabled drill-down mode or not. Click the library goal name to edit the goal in the drill-down mode. You can see the Measurements, Tasks, and Target Outcomes sections only in the drill-down mode. To edit a goal in the inline mode, select **Edit** in the Actions menu of the goal.

Considerations for Restricting Library Goals

Your organization might want to restrict the library goals that employees and managers can see and add to their goal plan. They might want to show only goals that are relevant to a person's business unit, department, legal entity, and job family.

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How to Enable Library Goals Restriction

To restrict library goals shown, your administrators need to do these tasks:

1. Enable the **Restrict Library Goals Enabled** profile option.
2. Define the workforce structure parameters such as business unit, department, legal entity, and job family for a library goal.

What Happens If Library Goals Are Restricted

This table lists how the library goals are restricted for Talent Management users when your administrators enable this feature.

Library Goals Users Can See

Scenario	Library Goals Users Can Select and Add when Feature's Enabled
Worker adds a library goal to their goal plan.	Only library goals that are relevant to the worker's assignment, business unit, department, legal entity, and job family
Manager or HR specialist adds a library goal to a team member's goal plan from the person's Goals page or spotlight page.	Only library goals that are relevant to the team member's assignment, business unit, department, legal entity, and job family
Manager or HR specialist adds a library goal to many team members from the Performance Overview page.	Only library goals that are relevant to the assignment, business unit, department, legal entity, and job family of the manager or HR specialist
A facilitator adds a library goal to a member of the review population when conducting a Talent Review meeting.	Only library goals that are relevant to the member's business unit, department, legal entity, and job family

Note that this restriction doesn't apply to HR specialists when they use the administrator goal pages that they access in **My Client Groups**. They can select and add any library goal on these pages.

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13 Scheduled Processes for Assigning Goals

Overview of Performance Goals Scheduled Processes

As an HR specialist or goals administrator, you can schedule and run processes to assign performance goals through goal plans and goal plan sets. You can also schedule a process to assign performance goals to multiple workers.

Use **Tools** > **Scheduled Processes** or the **Scheduled Process for Performance Goals** link on the administrator Goals landing page to schedule processes for Goal Management.

Process Name	Description	Parameters
Mass Assign Goals	Assigns goals to multiple workers or creates goal plans for multiple workers at one go.	**Process Name**: You must select a name for the process of mass assigning goals.
Assign Goal Plan	Assigns goal plan to the workers.	**Process Name**: When you select the goal plan, the start and end dates of the goal plan appear. You can specify **Effective Date** to include workers in the goal plan having a hire or start date the same as or earlier than the specified effective date. If you don't specify **Effective Date**, the application uses the current date as the effective date. For scheduled processes, the date when the process runs is used as the effective date every time the process runs.
Assign Goal Plan Set	Assigns goal plan set to the workers	**Process Name**: When you select the goal plan set, the start and end dates of the goal plan set appear. You can specify **Effective Date** to include workers in the goal plan having a hire or start date the same as or earlier than the specified effective date. If you don't specify **Effective Date**, the application uses the current date as the effective date. For scheduled processes, the date when the process runs is used as the effective date every time the process runs.
Purge Goal Temporary Records	Deletes temporary records of goals assigned to employees according to the specified number of days.	**Purge Start Days**: Indicates the number of days from the current day to remove the transient data in the application. The default value is 15. The transient data earlier to 15 days from the current date is removed by running this process. If you expect more data to purge, you can set **Purge Start Days** to a minimum of 3 days so that data before 3 days from the current date is purged.

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Process Name	Description	Parameters
		Depending on the frequency of running the Goal processes such as Mass Assign Goals, Assign Goal Plans, or Assign Goal Plan Sets, data gets accumulated in database storage. The application can become slow. You can schedule this process for the required duration to purge the data.
Check Goal Data Integrity	Fixes issues such as duplicate goal plan assignments and locked Goals page when approvals are pending.	• **Action**: The action for the integrity check. You can preview the results or update the results. This is based on the Goal Data Integrity Check Action (ORA_HRG_DATA_INTEG_CHEK_ACTION) lookup. • **Review Period**: Review period of the goal plan for which the integrity check is to be done. • **Goal Plan**: Name of the goal plan to check. • **Person Number**: Person number of the worker whose goal plan you want to check.

Related Topics

- Options for Mass Assignment of Performance Goals
- What are the scheduled processes?
- Examples of Process Options
- Statuses of Scheduled Processes

Manage Performance Goals Scheduled Processes

The process of assigning performance goals using goal plan sets, goal plans, and mass assignment requests is an Enterprise Scheduler Service process. HR specialists submit and run the process on the Manage Goal Scheduled Process page.

Managing Scheduled Processes

Follow these steps:

1. Use one of these methods to open the schedule process page.

   o Go to **Tools** > **Scheduled Processes**. Search for and select the **Manage Goal Scheduled Process** process.
   o Click the **Scheduled Process for Performance Goals** link on the administrator Goals landing page.

2. Search for and select a process name.

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3. Run the process as soon as possible or at a scheduled time.

> **Note:** By default, the process runs as soon as possible if you submit the process without selecting a schedule.

4. Click **Advanced** and on the Scheduled tab, select **Using a schedule** to specify a date and time when you want the process to run. Or set up a recurring schedule for the process to run at the selected frequency.

After the process completes, the application assigns performance goals, goal plans, and goal plan sets as included in the request to all workers selected in the request.

Related Topics
- View Status and Other Details for Scheduled Processes

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14 Eligibility Profiles for Assigning Goals

How You Use Eligibility Profiles when Assigning Performance Goals

An eligibility profile in Oracle Fusion Cloud Goal Management defines criteria used to determine whether an individual qualifies for a performance goal.

HR specialists can use eligibility profiles to establish eligibility for performance goals when creating these entities:

- A goal plan set for performance goal plans only
- A goal plan
- A mass assignment request for performance goals
- A mass share request for performance goals

Assignment of Goals According to Eligibility

If you select eligibility profiles in a goal plan set, goal plan, or in a mass assignment request for performance goals, the application assigns goals as follows:

- If all eligibility profiles are marked as required, then an individual must meet criteria of all the eligibility profiles.
- If no eligibility profile is marked as required, then an individual must meet criteria of at least one eligibility profile.
- If some eligibility profiles are marked as required and some aren't, then an individual must meet criteria of all the required profiles and at least one nonrequired profile.
- If only one eligibility profile is marked as required, then an individual must meet criteria of that eligibility profile.

Restricting Goal Availability

You can restrict performance goals to individuals who meet eligibility requirements by job, job role, location, age, or other criteria. You must select eligibility profiles with profile usage marked as Goals Management. You can also select whether an eligibility profile is required for goals. For example, you can add the following eligibility profiles to a goal:

- Location is France
- Designation is Marketing Manager
- Designation is Product Manager

When mass assigning goals or creating and assigning a goal plan or goal plan set, you select Location is France as the required eligibility profile and leave the other two eligibility profiles as not required. In this case, the application assigns goals to all individuals whose location is France and designation is Marketing Manager or Product Manager.

Eligibility Profiles and Goal Plan Sets

Select eligibility profiles to restrict the goal plans added to a goal plan set to workers who meet the profile criteria. You can edit an existing goal plan set to add a new set of eligibility profiles to the goal plan set. The performance goals

included in the goal plan are assigned to eligible workers. Eligibility profiles you add to a goal plan set supersedes any eligibility profiles added at the goal plan level.

Eligibility Profiles and Goal Plans

Select eligibility profiles to restrict the performance goals added to a goal plan to workers who meet the profile criteria. You can edit an existing goal plan to add a new set of eligibility profiles to goal plans.

Eligibility Profiles and Mass Assignment or Mass Sharing of Goals

Select eligibility profiles to restrict the performance goals during mass assignment or mass sharing of goals to individuals who meet the criteria of all required profiles and at least one nonrequired profile. You can edit an existing mass assignment request to add a new set of eligibility profiles.

Eligibility Profiles and Goals Accessibility

Use eligibility profiles when you mass assign performance goals or create and assign goal plans and goal plan sets to a target population. However, using eligibility profiles in these Oracle Goal Management processes doesn't control a person's accessibility to performance goals from other sources. You might assign a performance goal to a worker from the goal library or from other Oracle Fusion Cloud business processes, such as during a talent review meeting, or during a performance evaluation.

Related Topics
- Goal Plans
- Goal Plan Sets
- Mass Assignment of Performance Goals
- Eligibility Profiles

FAQs for Eligibility Profiles for Assigning Goals

Can I verify a person's eligibility to assign a goal plan or goal plan set?

Yes. Use the Check Person Eligibility button in the Selected Eligibility Profiles section of the goal plan. For goal plan sets, the Check Person Eligibility button is available in the Population page.

- For goal plans, in the **Check Person Eligibility** page, search for the person and then click **Check Eligibility**.
- For goal plan sets, in the **Check Person Eligibility** window, search for the person and then click **Review**.

The application validates the person for the specified eligibility profiles. If many eligibility profiles exist, then you can see these results:

- Overall eligibility status
- Eligibility status for each eligibility criteria
- Reason why a person is ineligible for a particular criteria

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As a goals administrator, what are the ways in which I can assign performance goals to employees in specific positions?

As a goals administrator, you can assign performance goals for specific positions.

You can do this in 2 ways:

- As part of a goal plan assignment
- Mass assignment or sharing of performance goals

In both cases, you can define the relevant position in an eligibility profile. You need to associate the eligibility profile with a mass goal assignment or sharing process, or a goal plan assignment. Then add goals that are relevant to that position. When you run the relevant scheduled process, only employees who have the position indicated in the eligibility profile are assigned the performance goal.

Related Topics
- How You Assign Goal Plans
- Mass Assignment of Performance Goals
- Mass Sharing of Performance Goals
- Eligibility Profiles

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15 Goal Integrations

How Goal Management Works with Profiles

Using Profile Management, you can configure and maintain employee skills and competencies. You can configure this content to support requirements for goal target outcomes. These target outcomes enable employees to enhance or improve their skill sets.

After an employee completes a performance goal, the employee's person profile is updated to include the content item that the target outcome addresses.

This image shows how Goal Management works with Profile Management. As you can see in the image, some competencies are defined in the content library of Profile Management. These are available for you to add as target outcomes of performance goals for an employee. In the image, the Adapting to Change target outcome is added to James Ng's Increase Team Efficiency by 20 percent performance goal. When James Ng completes this goal, the ratings assigned for the Adapting to Change target outcome is updated in James Ng's Talent profile.

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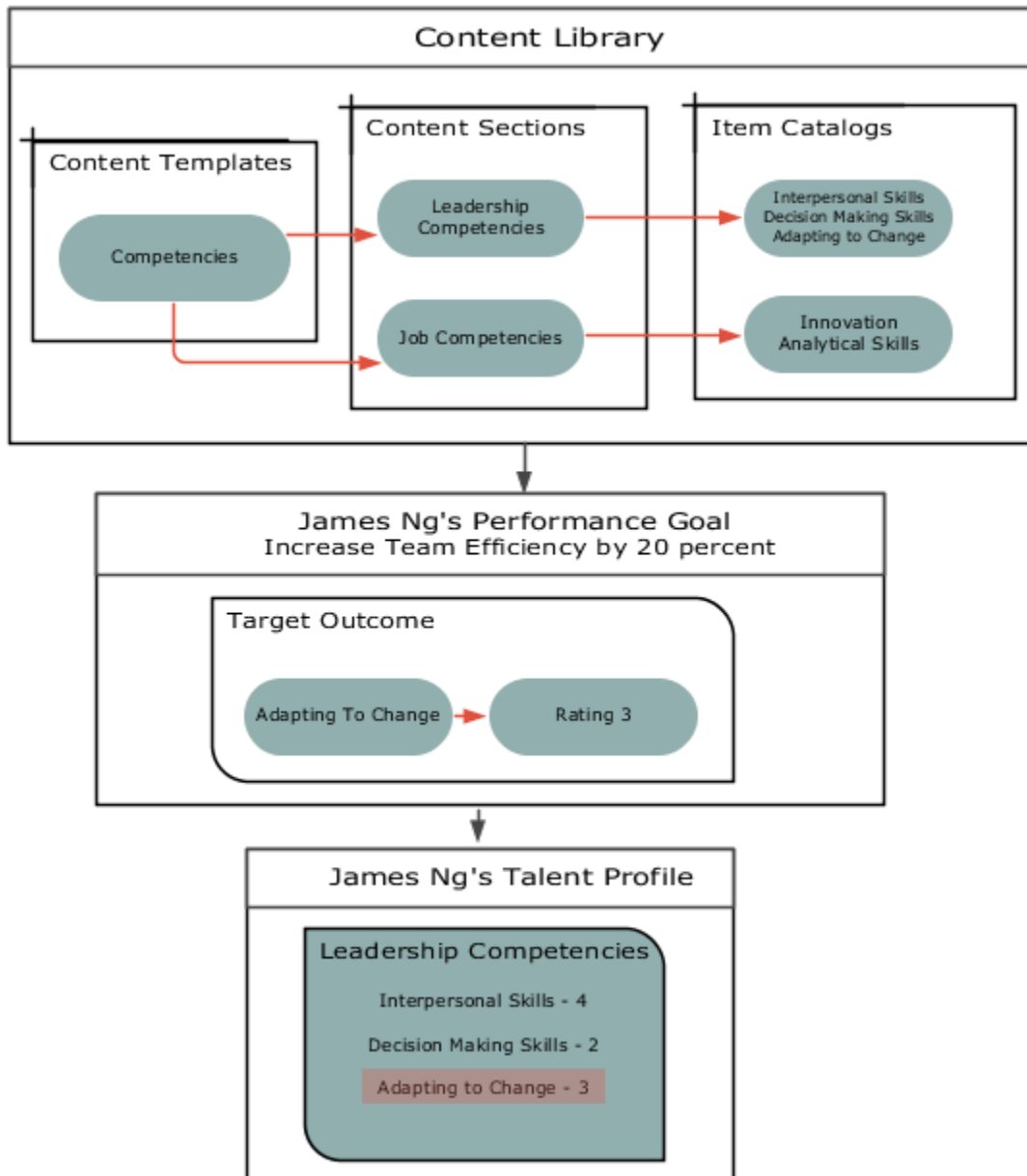
What You Need to Do to Add Target Outcomes

Here are the prerequisites for adding target outcomes to a goal:

- Relevant content sections must be configured in Profile Management where administrators can define goal target outcomes using the **GOAL** subscriber code. This establishes a relationship between the goal target outcomes and the content maintained on the talent profile.

- The **HRG_ENABLE_OUTCOMES** profile option must be enabled.

Which Content Templates You Can Use for Target Outcomes of Performance Goals

While configuring sections for target outcomes of performance goals, you can use only these content templates:

- Certifications
- Competencies
- Education
- Honors
- Languages
- Memberships
- Special Projects
- Skills

Remember that you can't use these content templates:

- Accomplishments
- Area of Study
- Career Preferences
- Career Statement
- Education Level
- Highest Education Level
- Technical Post Details
- Work History
- Work Preferences

When You Can Add Target Outcomes to Performance Goals

Irrespective of the configured profile content section access, you can add target outcomes to performance goals and edit and save the goals. You can add target outcomes to performance goals when performing any of these actions:

- Add goals to the goal library.
- Add goals to a goal plan when creating or populating the plan.
- Mass assign goals.
- Administer goals.

How Employee Profiles Are Updated

When a performance goal that has target outcomes is completed, the employee's talent profile is updated to include the target outcomes.

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Administrators can include ratings for target outcomes. For example, the completion of a goal like certification can include a rating for competency such as junior associate, associate, professional, specialist, and expert. This allows the employee or the manager to evaluate the employee's performance.

- When performance goals approvals are enabled, the manager can set the rating of a target outcome. They need to do this before target outcome is added to the employee's talent profile.

- When performance goals approvals are bypassed, the employee can set the rating that's added to the talent profile.

Related Topics
- Goal Management Profile Options
- Content Sections
- Content Section Properties

How Performance Documents Work with Performance Goals

This topic explains how Performance Management and Goal Management work together. You can include performance goals in employees' performance documents. This will help you to review their performance and evaluate if they have achieved the goals that were assigned to them.

The details of the performance goals that you see in a performance document is always synchronized with the goal details that you see in Goal Management. How is this synchronization achieved? Review periods and the Performance Goals section of a performance document are the components that help to integrate performance documents and performance goals.

Review Periods

When you create a performance template, you select a review period for each document period. You also associate a document type with the performance template.

When you create a goal plan, you select a review period and then associate performance document types with the goal plan. Only goals from goal plans with the same review period and performance document type as the performance template appear in a performance document when you create it based on the template.
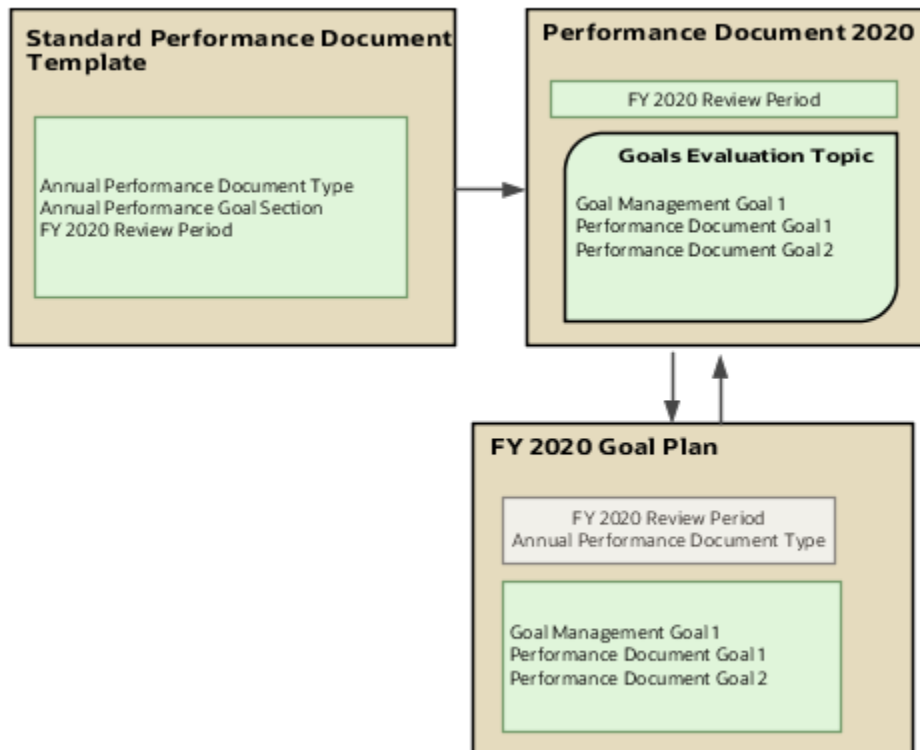
Performance Goals Section

Use the Performance Goals section type in the performance template to create a section for performance goals. For the Performance Goals section, you can use rating models to rate employees and use calculation rules to calculate an overall goal section rating. Remember to enable ratings and comments so that managers, employees, and participants can select a rating for the section and provide comments.

In the Performance Goals section, you can select these check boxes:

- **Populate with Worker Performance Goals**: To add goals from goal plans in Goal Management to the performance document.

- **Allow update goals action to update goal weights from goal management business process**: To update goals in performance documents with weights that are revised in Goal Management.

The image shows how the document type and review period helps to integrate performance documents with goal plans. As you can see in the image, the same document type and review period are used in both the Standard Performance Document Template performance document template and the FY2020 Goal Plan goal plan. When the Performance Document 2020 document is created based on the Standard Performance Document Template document template, the Goal Management Goal 1 goal available in the FY 2020 Goal Plan goal plan is automatically included. You can see the goals added in the Performance Document 2020 document in the FY 2020 Goal Plan goal plan.

Add Performance Goals to Performance Document

Add performance goals to performance documents in these ways:

- Employees and managers can add individual performance goals or library goals directly to a performance document if the goal plan to which they add the goal allows employees or managers to add goals. Remember that only goal plans that match the performance document configuration will be available for adding the goal.

  Note: If approvals are enabled, performance goals are included after the approval process is complete.

- Employees and managers can import performance goals from other performance documents of the employee. Note that the ratings and evaluation comments aren't copied when you import goals.

- As you already know, you can associate goal plans in Goal Management with performance document types. When you create any performance document based on an associated document type, the application adds the goals in the goal plan to that performance document.

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Update Performance Goals in Performance Documents

Managers or employees can edit goals that already exist in the performance document in Goal Management. Here's how the changes are updated in the performance documents that the goals are included in:

- When the manager or employee opens the performance document, all edits to performance goals except weights appear in the performance document.

- Only when the manager or employee uses the **Update Goals** action in the performance document, goal edits including weights appear in the document.

To populate the performance document with new performance goals from Goal Management, use the **Update Goals** action.

When you edit goals in performance documents, the changes are updated in Goal Management when you save or submit the performance document. But note that the updated weights aren't copied to Goal Management.

Goal ratings provided in performance document aren't available in Goal Management. Evaluation comments added to performance documents don't show up in Goal Management. But you can see comments added to goals in Goal Management in the associated performance documents.

Performance Goals in Completed Performance Document

When a performance document is completed, the performance goals in the document are updated in Goal Management. After this you can't update the goals in the performance document. If the goals are updated in Goal Management, the changes aren't copied to the performance document.

When you reopen a completed performance document, users can edit the performance goals included in the document. You can see the goal changes in Goal Management.

Remove Performance Goals from Performance Documents

Only managers and employees can manually remove goals from performance documents. Note that you can't delete goals that are included in a performance document in Goal Management. They need to be removed from the performance documents first.

Related Topics
- Review Periods in Talent Management
- Create a Performance Template
- Create a Performance Template Section for Performance Goals
- Overview of Performance Document Types

How Global Transfers Impact Performance Goals

When you transfer a worker permanently to a new legal employer, as administrators or managers you can select the performance goals you want to transfer to the new assignment.

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Administrators can move goals in the Performance Goals and Documents section of the Create Mass Legal Employer Change page. Administrators and managers can move goals in the Performance Goals and Documents section of the Local and Global Transfer page.

Users have these options when moving performance goals:

- Move all the workers' performance goals associated with all review periods.

- Select only current and future review periods and leave historic performance goals associated with the inactive assignments.

The **Move Performance Goals and Documents** process runs when you move performance goals to the new assignment. The process is scheduled to run on the effective date of the global transfer. After the process completes, the transferred workers and their new managers can view the moved performance goals for the new assignment. The goals won't be visible as part of the old assignment.

These considerations apply for transfer of performance goals in a global transfer:

- A worker might have the same performance goals and goal plans associated with many assignments within the same work relationship. In this case, only the performance goals associated with the primary assignment are moved to the new assignment created by the process. The performance goals associated with secondary assignments will remain associated with them for further processing, canceling, or deleting.

- You can't manually schedule the **Move Performance Goals and Documents** process.

- If any goal plans of the worker for the selected review periods are pending approval, the global transfer won't move any performance goals to the new assignment. Check the log file of the scheduled process to identify the performance goals that aren't transferred.

- If the global transfer is canceled, then the goals are transferred back to the original assignment.

Related Topics
- Local and Global Transfer
- Mass Legal Employer Change

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