

Oracle Fusion Cloud Talent Management

**Goals Center Questions and
Answers**

FA Latest



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Get Help

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Thanks for helping us improve our user assistance!

1 Goals Center Questions and Answers

What's the maximum number of characters for the goal name?

The goal name can be up to 400 characters.

What are the goal definition attributes of a performance goal?

Some key attributes are used to define a performance goal.

- Name
- Description (Additional information about the goal)
- Success Criteria
- Target Completion Date
- Priority
- Category
- Weight
- Measurement attributes
 - Unit of Measure
 - Target Criteria
 - Target Value

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.

What are library goals?

Library goals are reusable goals that are created and maintained to manage the enterprise goal-setting process efficiently.

HR specialists create these library goals. Library goals help to define goals consistently and reduce the effort of creating new goals.

Users can add these library goals in the Goal Management, Performance Management, and Talent Review work areas. To search for goals in the performance goal library, your role needs to have the **Use REST Service - Performance Goals List of Values** function security privilege.

What's a 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 adding a performance goal or mass assigning performance 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.

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

You have options to cancel or delete performance goals.

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.

How do goal and goal plan settings control the actions that managers and employees can do?

The **Allow assignees to edit goal definition** goal setting and various goal plan settings control the actions that managers and employees can do.

This table describes the effect of different combinations of the **Allow Updates to Goals By** goal plan setting, the goal setting goal plan settings and the **Allow assignees to edit goal definition** goal setting.

Allow Updates to Goals By Goal Plan Setting	Don't allow workers to add goals after the end date for setting goals	Don't allow workers to edit, cancel, or delete goals after the end date for setting goals Goal Setting Option of Goal Plan	Allow assignees to edit goal definition Goal Setting	What Managers Can Do	What Employees Can Do
HR specialist	<ul style="list-style-type: none"> Not selected Selected 	<ul style="list-style-type: none"> Not selected Selected 	<ul style="list-style-type: none"> Not selected Selected 	<ul style="list-style-type: none"> Can view goals Can't add goals Can't update goals 	<ul style="list-style-type: none"> Can view goals Can't add goals Can't update goals
HR specialist and manager	<ul style="list-style-type: none"> Not selected Selected 	<ul style="list-style-type: none"> Not selected Selected 	<ul style="list-style-type: none"> Not selected Selected 	<ul style="list-style-type: none"> Can view goals Can add goals to a team member's goal plan Can update goals in a team member's goal plan 	<ul style="list-style-type: none"> Can view goals Can't add goals Can't update goals
HR specialist, manager, and worker	Not selected	Not selected	Not selected	<ul style="list-style-type: none"> Can view goals Can add goals to a team member's goal plan Can update goals in a team member's goal plan 	<ul style="list-style-type: none"> Can view goals Can update only progress attributes for assigned goals Can add and update own goals without any restrictions
	Not selected	Not selected	Selected	<ul style="list-style-type: none"> Can view goals Can add goals to a team member's goal plan Can update goals in a team member's goal plan 	<ul style="list-style-type: none"> Can view goals Can update assigned goals without any restrictions Can add and update own goals without any restrictions

Allow Updates to Goals By Goal Plan Setting	Don't allow workers to add goals after the end date for setting goals	Don't allow workers to edit, cancel, or delete goals after the end date for setting goals Goal Setting Option of Goal Plan	Allow assignees to edit goal definition Goal Setting	What Managers Can Do	What Employees Can Do
	Selected	Not selected	Not selected	<ul style="list-style-type: none"> • Can view goals • Can add goals to a team member's goal plan • Can update goals in a team member's goal plan 	<ul style="list-style-type: none"> • Can view goals • Can update only progress attributes for assigned goals • Can update own goals without any restrictions. • Can't add new goals after the end of the goal setting period
	Selected	Not selected	Selected	<ul style="list-style-type: none"> • Can view goals • Can add goals to a team member's goal plan • Can update goals in a team member's goal plan 	<ul style="list-style-type: none"> • Can view goals • Can update assigned goals and own goals • Can't add new goals after the end of the goal setting period
	Not selected	Selected	Not selected	<ul style="list-style-type: none"> • Can view goals • Can add goals to a team member's goal plan • Can update goals in a team member's goal plan 	<ul style="list-style-type: none"> • Can view goals • Can update only progress attributes for assigned goals within the goal setting period • Can update own goals only within the goal setting period • Can add new goals even after the end of the goal setting period
	Not selected	Selected	Selected	<ul style="list-style-type: none"> • Can view goals • Can add goals to a team member's goal plan • Can update goals in a team member's goal plan 	<ul style="list-style-type: none"> • Can view goals • Can update assigned goals and own goals only within the goal setting period • Can add new goals even after the end of the

Allow Updates to Goals By Goal Plan Setting	Don't allow workers to add goals after the end date for setting goals	Don't allow workers to edit, cancel, or delete goals after the end date for setting goals Goal Setting Option of Goal Plan	Allow assignees to edit goal definition Goal Setting	What Managers Can Do	What Employees Can Do
					goal setting period
	Selected	Selected	Not selected	<ul style="list-style-type: none"> Can view goals Can add goals to a team member's goal plan Can update goals in a team member's goal plan 	<ul style="list-style-type: none"> Can view goals Can update only progress attributes for assigned goals Can update own goals only within the goal setting period Can't add new goals after the end of the goal setting period
	Selected	Selected	Selected	<ul style="list-style-type: none"> Can view goals Can add goals to a team member's goal plan Can update goals in a team member's goal plan 	<ul style="list-style-type: none"> Can view goals Can update assigned goals and own goals only within the goal setting period Can't add new goals after the end of the goal setting period

Note: Managers can update the **Allow assignees to edit goal definition** goal setting only for goals assigned to a team member by the manager or HR specialists.

This table describes how the **Actions for Workers and Managers on HR-Assigned Goals** goal plan setting along with the **Don't allow workers to edit, cancel, or delete goals after the end date for setting goals** goal setting option controls the ability of managers and employees to cancel or delete goals assigned by HR specialists.

Actions for Workers and Managers on HR-Assigned Goals Goal Plan Setting	Don't allow workers to edit, cancel, or delete goals after the end date for setting goals Goal Setting Option of Goal Plan	What Managers and Employees Can Do
Cancel and delete	Not selected	Managers and employees can cancel and delete goals assigned by HR specialists even after the end date of the goal setting period.
	Selected	<ul style="list-style-type: none"> Managers can cancel and delete goals assigned by HR specialists even after the end date of the goal setting period.

Actions for Workers and Managers on HR-Assigned Goals Goal Plan Setting	Don't allow workers to edit, cancel, or delete goals after the end date for setting goals Goal Setting Option of Goal Plan	What Managers and Employees Can Do
		<ul style="list-style-type: none"> Employees can't cancel and delete goals assigned by HR specialists after the end date of the goal setting period.
Cancel only	Not selected	Managers and employees can cancel goals assigned by HR specialists even after the end date of the goal setting period, but not delete the goals.
	Selected	<ul style="list-style-type: none"> Managers can cancel goals assigned by HR specialists even after the end date of the goal setting period, but can't delete the goals. Employees can't cancel and delete goals assigned by HR specialists after the end date of the goal setting period.
Delete only	Not selected	Managers and employees can delete goals assigned by HR specialists even after the end date of the goal setting period, but not cancel the goals.
	Selected	<ul style="list-style-type: none"> Managers can delete goals assigned by HR specialists even after the end date of the goal setting period, but can't cancel the goals. Employees can't cancel and delete goals assigned by HR specialists after the end date of the goal setting period.

Why are some actions disabled for performance goals?

Validations are done for actions of performance goals. If any of these validations fail, then the goal actions are disabled.

All goal actions are disabled for these use cases:

- The person hasn't been assigned privileges to perform the goal action.
- An employee selects a goal in a goal plan for which the **Allow Updates to Goals By** goal plan setting is set to **HR specialist** or **HR specialist and manager**.
- A manager selects a goal in a goal plan for which the **Allow Updates to Goals By** goal plan setting is set to **HR specialist**.
- Approvals are pending for the goal plan.

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.

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	Goal Published for the Organization
Delete	<ul style="list-style-type: none"> Enabled for HR specialists Enabled if employee or manager are allowed to delete HR assigned goals Disabled otherwise 	Enabled	Disabled	Enabled	Enabled	Enabled	Disabled	Enabled	Enabled
Cancel	<ul style="list-style-type: none"> Enabled if employee or manager are allowed to cancel HR assigned goals Disabled otherwise 	Disabled	Disabled	Disabled	Disabled	Disabled	Disabled	Disabled	Enabled
Move	Enabled	Disabled	Disabled	Disabled	Disabled	Disabled	Disabled	Disabled	Enabled
Copy	Enabled	Enabled	Enabled	Enabled	Disabled	Disabled	Disabled	Disabled	Enabled
Extend	Enabled	Disabled	Disabled	Enabled	Disabled	Disabled	Disabled	Disabled	Enabled
Share	Enabled	Disabled	Enabled	Enabled	Disabled	Disabled	Disabled	Disabled	Disabled
Align	Enabled	Disabled	Disabled	Enabled	Disabled	Disabled	Disabled	Disabled	Enabled
Assign	Enabled only if the user has a manager role	Disabled	Enabled	Enabled	Disabled	Disabled	Disabled	Disabled	Enabled

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	Goal Published for the Organization

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

Validations for actions on goals included in performance or check-in documents also depend on the validations for goal actions in general. If the goal center 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.

Action	Goal Added to a Check-In Document	Goal Added to a Performance Document Is Rated or Commented	Goal Added to a Performance Document Isn't Rated or Commented
Delete	Disabled	Disabled	Enabled
Cancel	Disabled	Disabled	Enabled
Move	Disabled	Disabled	Enabled
Copy	Enabled	Enabled	Enabled
Extend	Enabled	Enabled	Enabled
Share	Enabled	Enabled	Enabled
Align	Enabled	Enabled	Enabled
Assign	Enabled	Enabled	Enabled
Print	Enabled	Enabled	Enabled

Why are some actions disabled for development goals?

Validations are done for actions of development goals. If any of these validations fail, then the goal actions are disabled.

All goal actions are disabled for these use cases:

- The person hasn't been assigned privileges to perform the goal actions.
- Approvals are pending for the development plan.

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.

Action	User Hasn't Created the Goal	Selected Goal Is Inactive	Selected Goal Is Complete	New Goal in Draft Approvals State	Updated Goal in Draft Approvals State	Deleted Goal in Draft Approvals State	Inactive Goal in Draft Approvals State
Delete	<ul style="list-style-type: none"> • Enabled for HR specialists • Disabled otherwise 	Enabled	Disabled	Enabled	Enabled	Disabled	Enabled
Make Inactive/ Make Active	Disabled	Enabled	Disabled	Enabled	Enabled	Enabled	Enabled
Copy	Enabled	Enabled	Enabled	Disabled	Disabled	Disabled	Disabled
Share	Disabled	Enabled	Enabled	Disabled	Disabled	Disabled	Disabled
Assign	Disabled	Enabled	Enabled	Disabled	Disabled	Disabled	Disabled

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

Validations for actions on goals included in performance or check-in documents also depend on the validations for goal actions in general. If the goal center 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.

Action	Goal Added to a Check-In Document	Goal Added to a Performance Document Is Rated or Commented	Goal Added to a Performance Document Isn't Rated or Commented
Delete	Disabled	Disabled	Enabled
Make Inactive/ Make Active	Enabled	Disabled	Enabled
Copy	Enabled	Enabled	Enabled

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

What happens when I copy a goal created in responsive Goal Management in Redwood Goals Center?

When you copy a goal created in responsive Goal Management, the goal details and tasks are copied. But if the responsive goal has measurements, they won't be copied.

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.

Can I add goals directly to a performance document?

No, you can't add goals directly to a performance document.

You need to add the goal to a goal plan in your Goals Center. The goal will automatically be included in the relevant performance documents.

Can I update my goals even after they are included in performance documents?

Yes, you can if any of the evaluation tasks such as worker self-evaluation, manager evaluation, or participant feedback, for the performance document aren't complete.

If the evaluation tasks aren't complete, the changes you make to your goal will reflect immediately in the performance documents in which it's included. But if any of the evaluation task is complete, the goals in the performance document are frozen and won't show the updates made in the Goals Center.

Can I view the goal progress and comments in performance documents?

Yes, select **Show goal info** in the performance document to view details such as the basic information, progress notes, measurements, tasks, and target outcomes.

How can I share my performance goal?

You can share your performance goal if your role has the Share Performance Goals (HRG_SHARE_PERFORMANCE_GOALS_PRIV) privilege.

1. Go to the **Me > Career and Performance > Goals Center**.
2. On the Performance tab, select the review period and goal plan of the goal that you want to share.
3. For the goal that you want to share, select the **Share** action.
4. In the **Share with** panel, select the persons you want to share the goal with.
5. Select the **Share** button.

What to do next

If approvals are enabled for sharing goals, you need to submit the goal plan for approval.

How can I identify the persons with whom I have shared a goal?

View the goal details to see who you've shared a goal with.

You can see the people with whom you have shared the goal with in the **Shared with** section.

How can I remove the shared goals that I've already added to my goal plan from the Explore tab of my Goals Center?

You need to select the **Ignore** action for removing the shared performance goals that you've added to your goal plan.

1. Go to the **Explore** tab of your Goals Center.
2. Apply the **Shared** and **Performance** filters.
3. Locate the goal that you've already added to your goal plan.
4. On the goal card, select the **Ignore** action.

Results:

The shared goal will also be removed from the Shared with section of the goal shared by the manager, HR specialist, or colleague.

Where can I view the goals shared with me?

You can view the goals shared with you on these pages of your Goals Center:

- Explore tab
- Suggested goals panel of the New Goal page

As an employee, how can I find goals that are relevant to me?

Use the Explore tab in your Goals Center to find library goals, organization goals, and goals that others have shared with you.

How do I add learning tasks for a development goal?

Here's how you add learning tasks for a development goal:

1. Edit or create a development goal.
2. In the **Tasks** section, select **Add > Learning Item**.
3. Search for and select the learning course.
4. Enter a name for the task.

5. Select **Save**.

Why am I not able to add a private goal to my goal plan?

You can't add private goals when your goal plan already has the maximum number of goals that's specified.

Why is the Align option for performance goals disabled for me?

You can see the **Align** option for performance goals only when some conditions are met:

- Your role needs to be granted the Align Performance Goals (HRG_ALIGN_PERFORMANCE_GOALS_PRIV) privilege.
- Others should have shared goals with you.

How do I move my goal to another assignment?

Use the **Move** action to move your goal to another assignment.

1. Go to **Me > Career and Performance > Goals Center**.
2. Find the goal that you want to move.
3. Select the **Move** action.
4. In the Move to panel, select these values:
 - Assignment to which you want to move the goal
 - Review period
 - Goal plan
5. Select the **Move** button.

How to add multiple measurements to a goal?

In Redwood Goal Management, measurements are part of tasks. You can add multiple tasks and include measurements for each task.

How can I set a performance goal as completed?

You can set a performance goal as completed in the **Update your progress** panel.

Open the performance goal that you want to set as completed. In the **Update your progress** panel, do these actions:

1. If your administrator has enabled the **Status** list of values, select the status as **Completed**.
2. If your administrator has enabled the **Completion Percentage** field, set the percentage to the maximum value.
3. Select the actual completion date.
4. Optionally, add a progress note.
5. Select **Update Progress**.

Who can see the notes added for a goal?

Both employee and the managers in the hierarchy of their manager can view the goal progress notes.

But only the author of the note can edit or delete the progress note.

Can I see goal notes in Anytime Feedback?

No, you can view goal notes only when you open the goal.

How can I delete a goal that has already been submitted for approval?

You need to withdraw the goal approval request first. Then you can delete the draft goal.

Why are employees not able to copy goals from a previous review period?

Ensure that the category of the performance goals in the previous review period hasn't been made inactive.

Why are workers not assigned goals immediately after their manager assigns a goal or their HR specialist mass assigns goals?

When manager assigns a goal to their direct reports or an HR specialist creates a mass assignment process, a scheduled process is created for goal assignment. Administrators need to schedule this process.

They need to go to **My Client Groups > Scheduled Process for Goals**. This table lists the parameters that the administrator can use to schedule the process.

Process Type	Process Name
Mass assign or share goals	The name of the mass assignment process that needs to be scheduled.
Assign goal plans	The name of the goal plan that includes the goals to be assigned.

The goals will be assigned to the direct reports after the process completes. Administrators need to review the process log and check if the goal is assigned. Sometimes the goals aren't assigned to a worker because the maximum goal limit for the goal plan is reached or if no goal plan is assigned to the worker.

Why am I not able to see the Achieved Weight and Actual Value fields when creating a performance goal although my administrator has enabled these fields?

Values for the Achieved Weight and Actual Value fields need to be specified only after you've started working on the goal.

So, you can't see these fields when you create a goal.

What happens after I undo the cancellation of a performance goal?

Here's what happens when you undo the cancellation of a performance goal:

- The goal's status is set to **Not Started**.
- The goal is included in all goal counts.

How does generative AI generate a goal when an employee adds a goal?

Generative AI generates content by passing the appropriate context to the large language model (LLM).

The performance or development goal is generated based on the goal name entered, the employee's business title, and department. These fields are populated in the generated goal:

- Goal name
- Description
- Success criteria

You can review these fields and either accept or modify their content.

How does generative AI generate a goal when a manager assigns a goal from their Team Goals Center?

Generative AI generates content by passing the appropriate context to the large language model (LLM).

The performance or development goal for assignment is generated based on the goal name entered, the manager's business title, and manager's department. Note that the goal isn't generated based on the business title of the team members. These fields are populated in the generated goal:

- Goal name
- Description
- Success criteria

The manager can review these fields and either accept or modify their content.

To generate appropriate goals for each individual team member, we recommend that the manager go to the team member's Goals page and then add a goal.

Which attributes of a performance goal can I update using an AI agent?

When using the Employee Goals Assistant or the Team Goals Assistant AI agents, you can update only these attributes of a performance goal:

- Goal name
- Description
- Start date

- Target completion date
- Priority
- Success criteria
- Completion percentage

Note: The value can be between 0 and 100 only. The status of the goal is updated automatically according to the specified percentage.

- Status

Note: The values can only be "NOT_STARTED", "IN_PROGRESS", or "COMPLETED". The completion percentage of the goal is updated automatically according to the specified status. If you specify both status and completion percentage, the status specified is prioritized. For example, if you specify the status as "NOT_STARTED" and the completion percentage as 10, the specified completion percentage value is ignored and it's set to 0.

Which attributes of a development goal can I update using an AI agent?

When using the Employee Goals Assistant or the Team Goals Assistant AI agents, you can update only these attributes of a development goal:

- Goal name
- Description
- Success criteria
- Start date
- Target completion date
- Priority
- Completion percentage

Note: The value can be between 0 and 100 only. The status of the goal is updated automatically according to the specified percentage.

- Status

Note: The values can only be "NOT_STARTED", "IN_PROGRESS", or "COMPLETED". The completion percentage of the goal is updated automatically according to the specified status. If you specify both status and completion percentage, the status specified is prioritized. For example, if you specify the status as "NOT_STARTED" and the completion percentage as 10, the specified completion percentage value is ignored and it's set to 0.

As a new manager of an employee, can I see the goals assigned by the previous manager of the employee?

Yes, you can see the goals assigned by the previous manager of the employee.

As a manager, how can I explore goals of a team member?

You can use the **Goals Center** quick action in My Team or go to your **Team Goals Center** page.

Select the team member's name to view the Goals page of that team member. Select the **Explore Goals** button in the **Performance** or **Development** tab of your team member's Goals page to explore performance or development goals for that team member.

As a manager, can I delete the performance goal that my team member has added?

No, you can't delete a performance goal that was added by your team member. But you can cancel it.

As a manager, how can I share my performance goals?

Use the **Share** action to share your performance goals.

Before you start

You can share your performance goals if your role has the Share Performance Goals (HRG_SHARE_PERFORMANCE_GOALS_PRIV) privilege.

Here's what to do

1. Go to the **Me > Career and Performance > Goals Center**.
2. On the Performance tab, select the review period and goal plan of the goals that you want to share.
3. Select the goals that you want to share.
4. Select the **Share** action.

5. In the **Share with** panel, select the persons you want to share the goal with.
As a manager, you can share the goal with any person you can access or your team members. If you select the **My Team** option, all your team members are selected by default. You can deselect the persons who you don't want to share the goal with.
6. Select the **Share** button.

What to do next

If approvals are enabled for sharing goals, you need to submit the goal plan for approval.

How to access indirect reports on my Team Goals Center?

On your Team Goals Center, use the **Switch Team** button to switch to the team of a direct report who's a manager.

How do I move a goal of my team member to their new assignment?

You can move goals on the Goals page of your team member.

1. From your Team Goals Center, go to the Goals page of the team member whose goal you want to move.
2. Find the goal that you want to move.
3. Select the **Move** action.
4. In the Move to panel, select these values:
 - o Assignment to which you want to move the goal
 - o Review period
 - o Goal plan
5. Select the **Move** button.

How can I view goals of a team member in the Team Activity Center?

Use the **Goals Center** action for the employee in your Team Activity Center.

How do I delegate my goal management tasks for a specific period?

Use the **Roles and Delegations** task under **Me** to delegate your tasks as a line manager.

You can delegate your role for a specific period.

Related Topics

- [Role Delegation](#)

How can I act on my delegated goal management tasks?

Use the **Goals Center** quick action in **My Team**. In the **Reports** filter, select **Others and delegated** to view your delegated reports.

You can do actions such as creating goals and updating goals for your delegated reports.

How to cascade goals from the top level down to managers and then to their direct reports?

As a manager, if you have the required privilege, you can share goals with all people in your organization.

Before you start

- Your administrator needs to enable creating organization goals.
- You need to have the Manage Performance Goal for Organization (HRG_MANAGE_PERFORMANCE_GOAL_FOR_ORGANIZATION_PRIV) privilege.
- You need to have the Executive Manager role

Share a goal with your organization

1. Create a performance goal or edit your existing goal.
2. Set the **Publish this goal for your organization** switch to **On** state.
3. Add or update the goal.

Results:

Employees in your organization can see the goal you shared on the **Explore** tab of their Goals Center. They can perform any of these actions on the published organization goals:

- Create a new goal based on the published goal. The new goal is aligned to the published goal.
- Align the published goal with one of their goals.

How can I restrict goal assignment to specific employees?

As goal administrators, use eligibility profiles to restrict goal assignment to employees who meet specific criteria.

An eligibility profile defines criteria used to determine whether an individual qualifies for a performance or development goal. The criteria can be personal criteria such as age, qualification, competency, or gender. It can also be employment related such as job, work location, or grade. You can use eligibility profiles with a **Goals Management** profile usage.

You can establish eligibility for performance goals when creating or editing these entities:

- A goal plan
- A mass assignment request for performance goals
- A mass share request for performance goals

For development goals, you can include eligibility profiles when defining a mass assignment process or editing an existing mass assignment process.

You can also set 1 or more eligibility profiles as required.

- If you mark all included eligibility profiles as required, then an employee must meet criteria of all the eligibility profiles.
- If you don't mark any included eligibility profile as required, then an employee must meet criteria of at least 1 eligibility profile.
- If you mark some eligibility profiles as required, then an employee must meet criteria of all the required profiles and at least 1 nonrequired profile.
- If you mark only 1 included eligibility profile as required, then an employee must meet criteria of that eligibility profile.

As an administrator, how can I allow managers and employees to delete goals that I assign?

As an administrator, you can control the users who can delete goals that you add to a goal plan or mass assignment process.

When you add a goal to a goal plan or mass assignment process or edit a goal that's already added, select 1 of these values from the **Who can delete this goal** list?

- **Managers only:** To allow only managers to delete the goal

- **Managers and employees:** To allow both 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 verify a person's eligibility for a goal plan assignment?

Use the **Check Person Eligibility** button in the **Eligibility profiles** section of the goal plan to verify a person's eligibility.

On the **Check person eligibility** panel, select the person and the effective date. Then select **Check Eligibility**.

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

How can I assign different goals to manager and employees under one goal plan?

You can assign different goals to manager and employees under one goal plan.

1. Add the common goals to a goal plan, say FY2025 Goal Plan.
2. Assign this goal plan to all eligible employees and managers.
3. Create a new eligibility profile for only managers with **Job** or **Position** criteria as **Manager** role.
4. Set up a mass assign goal process, say FY2025 Mass Assign Goals for Managers, and select the same goal plan (FY2025 Goal Plan). In the **Goals** section, add the additional goals that need to be assigned only to managers. Add the created eligibility profile for managers.
5. Run the mass assign goal process created in Step 4.

Results:

After the process completes, employees can see only the common goals while managers can view additional goals in the goal plan.

How to remove a person whose employment is terminated from an assigned goal plan?

As HR specialists, you need to use the **Manage Assignees** action to remove persons whose employment is terminated.

1. On the **Goal Plans** page, select the goal plan from which the terminated person needs to be removed.

2. Select the **Manage Assignees** action.
3. On the **Assignees** page, search for and select the employee who needs to be removed from the goal plan.
4. Select **Delete**.
5. Select **Remove** to confirm the employee's removal.

Can HR specialists add organization goals for employees?

No, HR specialists by default can't add organization goals.

As an HR specialist, can I transfer a manager's organization goals to another manager?

No, you can't transfer organization goals to another manager.

How can we enable creating organization goals?

To enable persons to create organization goals, you need to do these actions:

- Assign the Manage Performance Goal for Organization (HRG_MANAGE_PERFORMANCE_GOAL_FOR_ORGANIZATION_PRIV) privilege to these persons.
- Ensure that they have the Executive Manager role.

Can I update a review period that's in use?

If a review period is in use, then you can't change its start and end dates.

What happens when I inactivate a review period?

The business objects such as goal plans or performance documents already associated with the review period that you made 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 or performance document.

How can I delete a goal plan?

You can delete a goal plan that isn't assigned to any workers. You can't delete an assigned goal plan. 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 aren't listed.

How to delete a primary goal plan?

Remove all assignees for the primary goal plan and make it inactive.

You can also delete the primary goal plan using HCM Data Loader.

How to retrieve goals from a deleted goal plan?

Goals can't be recovered from a deleted goal plan.

How can I ensure that employees add a specified minimum number of goals to their goal plan?

On the goal plan page, use the **Minimum Goals for this Goal Plan** field to specify the minimum number of goals that a goal plan can have.

When the goal plan has less than the specified minimum number of goals, then the employees and their managers can see a banner on the Performance tab of the Goals Center that indicates the minimum number of goals for the goal plan.

How do I ensure that employees can't add or delete goals in a goal plan?

On the goal plan page, select **HR and Manager Only** or **HR Only** in the **Allow Updates to Goals By** list.

How can I ensure that employees can't delete or cancel goals while the goal plan is pending approval?

Update the **Goal Level Approval Enabled** (ORA_HRG_PERF_GOAL_LVL_APPROVL) profile option value to **N**.

How do I prevent managers and employees from updating goals in goal plans of previous review periods?

On the Goal Plans page, edit the goal plan that you want to restrict managers and employees from updating and select **HR specialist** in the **Allow Updates to Goals By** list.

How can I add a goal for an employee when the employee has no goals in their goal plan?

You can add goals for people who you can access on your Goals Center page.

1. Use the **Goals Center** quick action under My Client Groups to view your **Goals Center** page.
2. Search for the specific employee or apply filters to view persons matching the criteria applied. Select the name of a person to view their **Goals** page. Here you can view their performance and development goals.
3. On the **Performance** tab, select the review period and goal plan to which you want to add the goal.
4. Select **Add** to add a goal.

How to create a goal plan that can be updated only by HR specialists?

When you create the goal plan, select **HR specialist** in the **Allow Updates to Goals By** list.

How to restrict library goals access to the employee's department or business unit?

In Redwood Goals Center, employees and managers can only view library goals that are relevant to the employee's legal entity, business unit, job family, and department by default.

You don't need to enable any profile option for this.

Why can't employees see the Weight field even after it's enabled in Visual Builder Studio?

Check if weights are enabled for the goal plan in the goal plan details. Goal weight isn't controlled only by the Visual Builder Studio property.

How to assign a goal plan to employees in bulk using HDL?

Use the `MassRequest` discriminator to load goal plan mass request records using HCM Data Loader.

The `Mass Request` component holds attributes of the mass request object associated with the goal plan. It's referenced by sub-components that collectively define the employee population or organization to assign the goal plan to.

The `Mass Request Assignment` component holds information about an organization to associate the goal plan with. Use the `MassRequestAssignment` discriminator to load mass request assignment records for a mass request within a goal plan using HCM Data Loader.

This example **GoalPlan.dat** file creates a goal plan with a mass request assignment for the mass request.

```
METADATA|GoalPlan|GoalPlanExternalId|GoalPlanName|GoalPlanTypeCode|GoalPlanActiveFlag|EnableWeightingFlag|
StartDate|EndDate|EnforceGoalWeightFlag|GoalAccessLevelCode|IncludeInPerfdocFlag|ReviewPeriodName
MERGE|GoalPlan|GP_001_05|GP_001_05|Performance|A|Y|2025/01/01|2025/12/31|Y|HR specialist and manager|N|
Default Review Period - Vision Corporation Enterprise
METADATA|MassRequest|GoalPlanExternalId|ReqSubmittedByPersonNumber
MERGE|MassRequest|GP_001_05|8153756
METADATA|MassRequestAssignment|OrganizationName|GoalPlanExternalId
MERGE|MassRequestAssignment|Vision Corporation Enterprise|GP_001_05
```

This example **GoalPlan.dat** file creates a mass request assignment for a goal plan and mass request that already exist. This file uses the user keys attributes to identify the existing goal plan and organization, but you can also use source keys instead.

```
METADATA|MassRequestAssignment|OrganizationName|GoalPlanExternalId
```

MERGE|MassRequestAssignment|Vision Air|GP_001_05

How do I ensure that performance goals of a goal plan are visible in performance documents?

You need to configure both performance documents and the goal plan to automatically add goals to the performance document.

Set Up Performance Documents for Synchronization

Add a **Performance Goals** type section in the performance template. 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, select these checkboxes:

- **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.

Set Up Goal Plans for Synchronization

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

When an HR specialist creates a performance document, these goal plans are automatically added as evaluation topics:

- Those that have the same review period as the performance document
- Those that have the same evaluation type as performance goal sections defined in the performance template

How do I exclude employees whose hire date falls within the last 6 months from the goal plan assignment?

You can use eligibility profiles to indicate who should be included in the goal plan assignment.

1. Create an eligibility profile with a **Length of Service** derived factor set to **One Year Service**.
2. Add this eligibility profile to the goal plan assignment.

How to transfer performance goals from one assignment to another assignment using HCM Data Loader?

You can transfer only the performance goals or both the performance goals and the performance documents in which the goals are included.

Transfer both Performance Goals and Performance Documents

You can transfer all performance goals and performance documents from one assignment to another assignment using the Performance Documents and Goals Assignment Transfer (**PerfDocUpdate.dat**) HCM Data Loader (HDL) business object. It enables the transfer of performance documents and goals from an inactive worker assignment to the new, active assignment after a rehire or change of legal employer.

Transfer only Performance Goals Without Performance Documents

You can transfer only performance goals from one assignment to another anytime by updating the **AssignmentId** attribute using the Goal (**Goal.dat**) HDL business object and then moving the goal plan assignment from the old assignment to the new one using the Goal Plan (**GoalPlan.dat**) business object with the **GoalPlanAssignment** discriminator .

Can we report on a specific goal plan in Oracle Transactional Business Intelligence?

Yes, create an analysis using the Workforce Goals - Goal Plan Assignments Real Time subject area

Why is an employee not able to view goals on the Development tab of their Goals Center?

To enable an employee to view and manage goals on the Development tab of their Goals Center, configure their custom role.

- Assign the View Development Goal function security policy.
- Assign the Manage Development Goal by Worker (ORA_HRG_MANAGE_DEVELOPMENT_GOAL_BY_WORKER) aggregate privilege.

How do I ensure that some employees can't share performance goals?

You need to create a custom role and assign it to employees who shouldn't share their performance goals.

The delivered employee role has the Share Performance Goals (HRG_SHARE_PERFORMANCE_GOALS_PRIV) privilege by default. You need to create a custom employee role and ensure that this role doesn't have this privilege. Grant this custom role to the employees who you don't want to share performance goals.

How do I enable adding target outcomes for performance goals?

Here's how you enable adding target outcomes for performance goals:

1. Configure relevant content sections in Enhanced Talent Profiles and define goal target outcomes using the **Goals** subscriber code. Remember that you can use only these content templates for target outcomes of performance goals:
 - Certifications
 - Competencies
 - Education
 - Honors
 - Languages
 - Memberships
 - Special Projects
 - Skills
2. Enable the HRG_ENABLE_OUTCOMES profile option.
3. Edit the **New Goal** and goal details page in Visual Builder Studio and set the **Show Target outcomes Section for Performance Goals** page property to **true**.

How do I hide specific goal actions for some employees?

You need to create a custom employee role and ensure that this role doesn't have the privilege corresponding to the goal action.

Grant this role to the employees for whom you want to hide the actions.

Privileges for Actions of Performance Goals

Action	Privilege Code	Privilege Name
Copy	HRG_COPY_PERFORMANCE_GOALS_PRIV	Copy Performance Goals
Share	HRG_SHARE_PERFORMANCE_GOALS_PRIV	Share Performance Goals
Align	HRG_ALIGN_PERFORMANCE_GOALS_PRIV	Align Performance Goals
Extend	HRG_EXTEND_PERFORMANCE_GOALS_PRIV	Extend Performance Goals
Move	HRG_MOVE_PERFORMANCE_GOALS_PRIV	Move Performance Goals
Cancel	HRG_CANCEL_PERFORMANCE_GOALS_PRIV	Cancel Performance Goals
Assign	HRG_ASSIGN_PERFORMANCE_GOALS_PRIV	Assign Performance Goals
Delete	HRG_DELETE_PERFORMANCE_GOALS_PRIV	Delete Performance Goals

Note: The privileges for the delete and cancel actions take precedence over the goal plan settings that allow workers and managers to delete or cancel HR-assigned goals. These actions will be available to the employees based on the privileges that they have.

Privileges for Actions of Development Goals

Action	Privilege Code	Privilege Name
Copy	HRG_COPY_DEVELOPMENT_GOALS_PRIV	Copy Development Goals
Share	HRG_SHARE_DEVELOPMENT_GOALS_PRIV	Share Development Goals
Assign	HRG_ASSIGN_DEVELOPMENT_GOALS_PRIV	Assign Development Goals
Delete	HRG_DELETE_DEVELOPMENT_GOALS_PRIV	Delete Development Goals

How to check if a goal plan is assigned to a specific employee?

On the Goal Plans page, use the **Manage Assignees** action for the goal plan.

On the Assignees page, search for the employee or apply filters to locate the employee.

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, select **Create**. You see the **Create Feedback Template** page.
4. Specify these details:
 - o Name of the template
 - o Status as **Active**
 - o Template type as **Performance goal feedback**
 - o Attributes to share in the feedback request
5. Select **Save and Close**.

How can an administrator delete multiple goals?

Here's how an HR Specialist can delete multiple goals.

1. Go to **My Client Groups > Goals**.
2. Apply filters.
3. Select goals that you want to delete in the search result.
4. From the **Actions** menu, select **Delete**.

How to enable target outcomes for development goals?

Do these steps to enable adding target outcomes for development goals:

1. Go to **My Client Groups > Profiles > Profile Types** and select the **Person** profile type. Configure relevant content sections and define goal target outcomes using the **Career Development** subscriber code. Remember that you can use only these content templates for target outcomes of development goals:
 - o Certifications
 - o Competencies
 - o Education
 - o Honors

- Languages
 - Memberships
 - Special Projects
 - Skills
2. Edit the New goal and goal details page in Visual Builder Studio and set the **Show Target outcomes Section for Development Goals** page property to **true**.

How can we hide the context value of descriptive flexfields on the goal details page?

Use Visual Builder Studio to hide the context value of descriptive flexfields on the goal details page.

1. Edit the New Goal or goal details page in Visual Builder Studio.
2. Select a project.
3. In Express mode, select the **Configure Fields and Region** button.
4. Expand the Form Rules region.
5. Add or edit a **Regular** form rule and give a suitable name and description.
6. Ensure that the rule is active.
7. In the Regions and Fields section, expand Goal Details.
8. Expand the performanceGoalsV2 resource.
9. Locate the descriptive flexfield field that you want to hide.
10. Set the **Hidden** property of the context value to **Hidden**.
11. Preview your changes and publish.

What privileges do I need to assign to users to allow them to manage goal lookups?

Assign these privileges to users who need to manage goal lookups:

- **Worker Goal Setting Lookups** task: Manage Application Set-Enabled Lookup (FND_APP_MANAGE_SET_ENABLED_LOOKUP_PRIV, Manage Application Standard Lookup (FND_APP_MANAGE_STANDARD_LOOKUP_PRIV))
- **Manage Common Lookups** task: Manage Application Common Lookup (FND_APP_MANAGE_COMMON_LOOKUP_PRIV)

How can I ensure that the line manager’s team is notified when the line manager publishes an organization goal?

You need to enable the **Worker notified after organization owner publishes a goal** template.

1. Use the Alerts Composer tool.
2. Search for the **Performance Goals Alerts** event.
3. Enable the **Worker notified after organization owner publishes a goal** template.

If I delegate goal plan approval, will the delegated manager be able to view the other details such as compensation information of the employee?

No, when you delegate approval for a goal plan, the delegated manager gets access only to approve the goals in the goal plan. They can’t see other details of the employee.

Access to other data will depend on the security profiles added to the role that the manager has.

How do I ensure that FYI notifications are sent for goal approvals?

To ensure that FYI notifications are sent for goal approvals set these profile option values to **TRUE**:

Profile Options for Goal Approval Notifications

Profile Option Code	Profile Display Name
BIP_EMAIL_NOTIFICATION_HCM	BI Publisher Notifications Enabled for Human Capital Management
BIP_EMAIL_NOTIFICATION_HCM_TALENT	BI Publisher Notifications Enabled for Talent Management
BIP_ONLINE_NOTIFICATION_HCM	BI Publisher Worklist Notifications Enabled for Human Capital Management
BIP_ONLINE_NOTIFICATION_HCM_TALENT	BI Publisher Worklist Notifications Enabled for Talent Management

Profile Option Code	Profile Display Name
<p>Note: This profile option isn't delivered. You need to create this and set it to TRUE.</p>	
<p>BIP_ONLINE_NOTIFICATION_HCM_GOALS</p> <p>Note: This profile option isn't delivered. You need to create this and set it to TRUE.</p>	<p>BI Publisher Worklist Notifications Enabled for Goals and Career Management</p>

How to configure approvals based on goal plan name?

When you create approval rules, use Attribute1 or Attribute8 for goal plan name or Attribute22 for goal plan ID.

How to configure approval rules so that goals added by the CEO are autoapproved?

Configure autoapproval and manual approval rules as indicated.

CEO Rule - Autoapproved

```
((transactionApprovalRequest.Requestor == "User.CEO") AND (transactionApprovalRequest.attribute25 == "Y") AND (transactionApprovalRequest.attribute10 != "") AND (Performance Goals != null))
```

Auto Approval Rule

```
((transactionApprovalRequest.Requestor != "User.CEO") AND (transactionApprovalRequest.attribute25 == "Y") AND (transactionApprovalRequest.attribute10 != "") AND (Performance Goals != null) AND (Performance Goals.Goal Version Type Code == "PENDING_APPROVAL") AND (Performance Goals.Goal Updated Flag != "Y") AND (Performance Goals.Legacy Key Attribute Updated != "Y"))
```

Manual Approval Rule

```
((transactionApprovalRequest.Requestor != "User.CEO") AND (transactionApprovalRequest.attribute25 == "Y") AND (transactionApprovalRequest.attribute10 != "") AND (Performance Goals != null) AND (Performance Goals.Goal Version Type Code == "PENDING_APPROVAL") AND ((Performance Goals.Goal Updated Flag == "Y") OR (Performance Goals.Legacy Key Attribute Updated != "Y")))
```

How can an administrator bulk approve performance goal transactions?

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

1. Go to **Tools > Transaction Console**.
2. Make sure you're on the Transaction Summary tab.
3. Filter for the **Approve Performance Goal** processes.
4. Select the goal plans that you want to approve.
5. From the Actions menu, select **Force Approval**.
6. Confirm the force approval.

How can an administrator bulk approve development goal transactions?

Use the Transaction Manager: Transactions page in the Transaction Console work area to approve multiple development plans.

1. Go to **Tools > Transaction Console**.
2. Make sure you're on the Transaction Summary tab.
3. Filter for the **Approve Development Goal** processes.
4. Select the development plans that you want to approve.
5. From the Actions menu, select **Force Approval**.
6. Confirm the force approval.

How to setup approval rule for role-based approval of performance goals?

You need to do these tasks to set up role-based approval:

- Use the Manage Administrator Profile Values task and set the **ORA_HRG_PERF_GOAL_ROLE_BASED_APPROVL** profile option to **Y**.
- Enable the Approve Performance Goal task in the Approval Rules tab of the Transaction Console.
- To configure approval rules only for manager role based approval and not for approvals requested by employees, set the value of the **Task.payload.transactionApprovalRequest.sensorNameFromData** payload attribute to **ORA_HRG_PERF_GOAL_ROLE_BASED_APPROVL** when configuring approval rule conditions.

How to unblock an employee who is not able to add, edit, or submit a goal for approval?

Terminate the duplicate draft **Approve Performance Goal** transactions for the employee in transaction console.
Go to **Navigator > Tools > Transaction Console** to open the transaction console.

How do I hide the Reject button in performance goal approval notifications?

As an administrator, you can review and modify approval tasks for performance goals.

1. In Setup and Maintenance, search for the **Manage Task Configurations** task.
2. Select the **Manage Task Configurations for Human Capital Management** task.
3. On the BPM Worklist page, search for and edit the **ApprovePerformanceGoal** task.
4. Go to the Access tab.
5. Expand the Actions region.
6. Deselect **Assignees** and **Owner** for the **Reject** task action.

How do I change the priority values displayed for a goal?

Use the HRG_PRIORITY lookup to change the priority values displayed for a goal.

1. Use the Worker Goal Setting Lookups task in the Setup and Maintenance work area.
2. Search for the **HRG_PRIORITY** lookup.
3. Edit the meaning shown for the lookups.
4. Select **Save and Close**.

How do I disable decimals for goal weights?

Set the value of the **Decimals in Goal Weights Allowed (HRG_ALLOW_DECIMALS_IN_WEIGHTS)** profile option to **No**.

How can I enable editing of completed performance goals?

Set the **Completed Goal Edit Options** (HRG_COMPLETED_GOAL_EDIT_OPTIONS) profile option to **Reopen** or **Always open** to enable editing of completed performance goals.

Related Topics

- [How do I enable a profile option?](#)

How to enable editing of completed development goals?

Set the **Completed Development Goal Edit Options** (ORA_HRD_COMPLETED_GOAL_EDIT_OPTIONS) profile option to **Yes** to enable editing of completed development goals.

Related Topics

- [How do I enable a profile option?](#)

How can I hide certain goal categories?

To hide specific goal categories, you need to edit the HRG_PERF_GOAL_CATEGORY lookup.

Use the **Manage Common Lookups** task in the Setup and Maintenance work area to edit the lookup. Clear the **Enabled** check box for the categories that you don't want to show and save your changes.

How can I enable alerts for managers assigning performance goals?

Use Alerts Composer to enable alerts for performance goals.

1. Go to **Tools > Alerts Composer**.
2. Search for the **Performance Goals Alerts** event.
3. Enable the **Worker Notified After HR/Manager Assigns Goal** alert template.

How can I enable deleting all goal plan assignees?

To enable the **Delete All Assignees** action for goal plans, you need to edit the administrators' **Goal Plans** page in Visual Builder Studio and set the **Show Delete All Assignees Action** to **true**.

How to enforce minimum or maximum weights for a goal within a goal plan?

You need to create validation rules in Visual Builder Studio for both the **New Goal** or **Goal Details** page and the **My Goal** page.

New Goal or Edit Goal Page

1. Select a goal plan that has weights enabled.
2. Edit an existing goal or add a goal.
3. Edit the page in Visual Builder Studio.
4. Select a project.
5. In Express mode, select **Validate Field Values**.
6. Add a validation rule.
7. In the Create Validation dialog, do these steps:
 - a. Select the rule type as **Regular**.
 - b. Add a label and optionally a description.
 - c. Select **Create**.
8. Ensure that the rule is active.
9. Select **Edit**.
10. Add a condition.
11. Select the **Weight** field.
12. Select the operator:
 - o To enforce maximum weight, select the **greater than** operator.
 - o To enforce minimum weight, select the **less than** operator.
13. Enter the maximum or minimum value.
14. Add a message.
15. Enter the text in the **Summary** and **Detail** fields.
16. Select the severity as **Error**.
17. Select **Done**.

My Goals Page

1. Go to the My Goals page of your Goals Center.
2. Ensure that you are on the **Performance** tab.
3. Edit the page in Visual Builder Studio.
4. Select a project.
5. In Express mode, select **Validate Field Values**.

6. Add a validation rule.
7. In the Create Validation dialog, do these steps:
 - a. Select the rule type as **Regular**.
 - b. Add a label and optionally a description.
 - c. Select **Create**.
8. Ensure that the rule is active.
9. Select **Edit**.
10. Add a condition.
11. Select the **Weight** field.
12. Select the operator:
 - o To enforce maximum weight, select the **greater than** operator.
 - o To enforce minimum weight, select the **less than** operator.
13. Enter the maximum or minimum value.
14. Add a message.
15. Enter the text in the **Summary** and **Detail** fields.
16. Select the severity as **Error**.
17. Select **Done**.

How to configure the visibility of descriptive flexfields for performance goals?

Use Visual Builder Studio to hide descriptive flexfields for performance goals.

1. Edit the New Goal or goal details page in Visual Builder Studio.
2. Select a project.
3. In Express mode, select the **Configure Fields and Region** button.
4. Expand the Form Rules region.
5. Add or edit a **Regular** form rule and give a suitable name and description.
6. Ensure that the rule is active.
7. In the Regions and Fields section, expand Goal Details.
8. Expand the performanceGoalsV2 resource.
9. Locate the descriptive flexfield that you want to hide and set its **Hidden** property to **Hidden**.
10. Preview your changes and publish.

How can I make the Description and Success Criteria fields as required fields?

Use Visual Builder Studio to set some fields as required fields.

1. Edit the New Goal or goal details page in Visual Builder Studio.
2. Select a project.

3. In Express mode, select the **Configure Fields and Region** button.
4. Expand the Form Rules region.
5. Add or edit a **Regular** form rule and give a suitable name and description.
6. Ensure that the rule is active.
7. In the Regions and Fields section, expand Goal Details.
8. Expand the performanceGoalsV2 resource.
9. Locate the **Description** field and set its **Required** property to **Required**.
10. Locate the **Success Criteria** field and set its **Required** property to **Required**.
11. Preview your changes and publish.

How can I add new evaluation types for goal plans?

Use the ORA_HRA_GOAL_PLAN_EVAL_TYPE extensible lookup to add new evaluation types.

You can't delete the delivered lookup values, but you can add new values. You can change the meaning and description of the lookup codes.

How can we ensure that employees can't add private goals?

Use Visual Builder Studio to hide the **Private goal** checkbox.

1. Edit the New Goal page in Visual Builder Studio.
2. Select a project.
3. In Express mode, select the **Configure Fields and Region** button.
4. Expand the Form Rules region.
5. Add or edit a **Regular** form rule and give a suitable name and description.
6. Ensure that the rule is active.
7. In the Regions and Fields section, expand Goal Details.
8. Expand the performanceGoalsV2 resource.
9. Locate the **Private** field and set its **Hidden** property to **Hidden**.
10. Preview your changes and publish.

How do I create a report on an employee's progress on goals?

Use the **Workforce Goals - Goal Tasks Real Time** subject area in OTBI to create a report to find out the goals that an employee has completed and a report on the goals that the employee is yet to complete.

How do I set up auditing policies for Goal Management business objects?

To set up auditing policies, you need to have the privileges of the delivered Application Implementation Consultant job role.

1. Use the **Manage Audit Policies** task in Setup and Maintenance.
2. On the **Manage Audit Policies** page, for Oracle Fusion Applications, ensure that the audit level is **Auditing**, and then select **Configure Business Object Attributes**.
3. On the **Configure Business Object Attributes** page, select the **Goal Management** product.
4. Select the objects to audit. You can select these goal objects:
 - o Goal tasks
 - o Goal weights of a goal plan
 - o Goal measurements
 - o Goal details
5. Select the **Create** icon or select the **Create** action.
6. In the **Select and Add Audit Attributes** dialog box, deselect the attributes that you don't want to audit.
7. Select **OK**.
8. Select **Save and Close**.
9. On the **Manage Audit Policies** page, select **Save and Close**.

How do I view audit reports of Goal Management?

If your administrator has configured auditing of Goal Management objects and if you have a role with the View Audit History (FND_VIEW_AUDIT_HISTORY_PRIV) privilege, you can view the audit report for Goal Management business objects.

1. Go to **Navigator > Tools > Audit Reports**.

2. On the Audit Reports page, do these actions:
 - a. Specify the period for which you want to view the report.
 - b. If you want to view the changes done by a specific user, search for and select that user.
 - c. Select the **Goal Management** product.
 - d. Optionally, select the business object that you want to audit and the event type to audit.
 - e. You can also opt to include child objects in the audit.
 - f. Select **Search**.