

# Oracle Fusion Cloud Talent Management

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**How do I configure approval  
notifications for performance  
goals?**

**FA Latest**



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## Get Help

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# Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

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# 1 How do I configure approval notifications for performance goals?

## Overview

Use Oracle Business Intelligence (BI) Publisher reports to configure approval notifications for performance goals.

To edit BI Publisher templates, you need to have the privileges of the delivered BI Administrator role.

Do these steps to configure approval notifications for performance goals:

1. Export the **PerformanceGoalApprovalNotificationsResponsiveDM** data model XML file. For more information, see [Export the Data Model XML File for Performance Goals Approvals](#).
2. Download the **PerformanceGoalApprovalNotificationsResponsive** report layout template. For more information, see [Download the Approvals Report Template of Performance Goals](#).
3. Edit prompts and headers in the template. For more information, see [Edit Approvals Report Template of Performance Goals](#).
4. [Preview the template](#).
5. [Upload the modified report layout](#) to the BI Publisher catalog.

## Export the Data Model XML File for Performance Goals Approvals

You need to export the eXtensible Markup Language (XML) file that includes the data model attributes predefined for the approval notifications for performance goals.

You can use the XML file to preview your modified template or add data model attributes to the template.

1. On the Oracle Business Intelligence Home page, click **Catalog**.
2. On the **Catalog** page, in the Folders section, expand **Shared Folders** > **Human Capital Management** > **Workflow Notifications** and select **Data Models** to display the data models in the right pane.
3. Under the **PerformanceGoalApprovalNotificationsResponsiveDM** data model, click the **Edit** option to open the Diagram tab on the **Performance Goal Notifications Data Model** page.
4. Go to the Data tab.
5. Click **Export**.
6. Save the downloaded **PerformanceGoalApprovalNotificationsResponsiveDM.xml** file to a local drive.

# Download the Approvals Report Template of Performance Goals

You need to create a copy of the report layout template in the Custom folder and download a copy of the template to your local hard drive to modify it.

1. On the Oracle Business Intelligence Home page, click **Catalog**.
2. On the **Catalog** page, in the Folders section, expand **Shared Folders > Human Capital Management** and select **Workflow Notifications** to display the templates in the right pane.
3. Under **PerformanceGoalRespApprovalNotificationReport**, click **More**, and then select **Customize**.  
A copy of the **PerformanceGoalRespApprovalNotificationReport** is created automatically in the Custom folder.
4. On the **PerformanceGoalRespApprovalNotificationReport** page, under the **PerformanceGoalRespApprovalNotificationReportTemplate** template, click **Edit**.
5. Save the downloaded document to your local hard drive. Save the template with the name **UpdatedPerformanceGoalRespApprovalNotifications.rtf** to distinguish it from the original template.

## Edit Approvals Report Template of Performance Goals

To configure the work flow email and in-app notifications for performance goal approvals, you need to edit a local copy of the **.rtf** report layout templates using Microsoft Word.

### Before you start

Download and install the Template Builder for Word to use Microsoft Word to edit the layout templates.

### Edit Template

1. Open the **UpdatedPerformanceGoalRespApprovalNotifications.rtf** template in Microsoft Word with the Template Builder installed. This document contains all notifications related to approvals of performance goals.
2. Make the necessary changes.
3. Save the document.

## Preview the Updated Template

You need to preview the updated notifications before uploading the updated **.rtf** file to the business intelligence (BI) catalog.

1. Open the **UpdatedPerformanceGoalRespApprovalNotifications.rtf** template in Microsoft Word with the Template Builder installed.
2. Go to the BI Publisher tab and click **Sample XML** within the Load Data group.

3. Browse to and select the **PerformanceGoalApprovalNotificationsResponsiveDM.xml** file you downloaded to import sample data from the data model.
4. In the **Data Loaded Successfully** dialog box, click **OK**.
5. From the BI Publisher tab in the ribbon, click **HTML** in the Preview group.  
This loads the report in the browser.

**Tip:** If you get any empty stack exception, ensure that the **xdo.cfg** file is available in the **C:\Users\<guid>\AppData\Local\Oracle\BIPublisher\TemplateBuilderforWord\config** folder.

6. Add this property in the **xdo.cfg** file:

```
<property name="xdk-secure-io-mode">false</property>
```

7. Download the work flow notification Redwood sub template and person header Redwood sub template and save it in your local folder.
8. At the top of the document, replace the path with the location of the downloaded sub template file on your computer.  
For example, `<?import:file:///C:/Users/Desktop/Workflow_Notification_Redwood_Subtemplate.rtf?>`
9. From the BI Publisher tab in the Ribbon, click **Validate Template** in the Tools group.
10. Also in the Tools group, click **Check Accessibility**.
11. Save your changes.

## Upload the Modified Report Layout

You need to upload the modified report layout so that approvers and requesters get the updated notifications.

1. On the Oracle Business Intelligence Home page, click **Catalog**.
2. On the **Catalog** page, in the Folders section, expand **Shared Folders > Custom > Human Capital Management** and select **Workflow Notifications** to display the templates in the right pane.
3. Under **PerformanceGoalRespApprovalNotificationReport**, click **Edit**.
4. On the **PerformanceGoalRespApprovalNotificationReport** page, click **Add New Layout**.
5. In the Upload or Generate Layout section, click the **Upload** icon.
6. In the **Upload Template File** dialog box, do these actions:
  - a. In the **Layout Name** field, enter **Updated Performance Goal Approval Notifications Template**.
  - b. In the **Template File** field, browse for the modified **UpdatedPerformanceGoalRespApprovalNotificationsTemplate.rtf** template on your local drive, select the template, and then click **Open**.
  - c. From the **Type** list, select **RTF Template**.
  - d. From the **Locale** list, select **English (United States)**.
  - e. Click **Upload**.
7. On the **PerformanceGoalRespApprovalNotificationReport** page, click **View a list** to open the **Layout** page.
8. In the row for the **Updated Performance Goal Approval Notifications Template**, select the **Default Layout** and **Active** checkboxes.
9. Click the **Save Report** icon.

