

Oracle Fusion Cloud Talent Management

How do I configure a mass share process for performance goals in Redwood?

FA Latest



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1 How do I configure a mass share process for performance goals in Redwood?

Overview of Mass Sharing of Performance Goals

As an administrator, you might want to share some performance goals with many employees in your organization at the same time. You need to create a mass share process to do this.

To mass share performance goals, do these steps:

1. Create a mass share process.

Tip: You can copy an existing mass share process and update it.

2. Schedule the mass share process.

After the mass share process is complete, the employees who you selected for sharing the goals can see the goals on the Explore tab of their Goals Center.

Create a Mass Share Process for Performance Goals

To create mass share processes for performance goals, use the **Setup of Goals Mass Processes** page if your organization has enabled combined administrator pages for performance and development goals. Else, use the **Setup of Performance Goals Mass Assignment and Mass Sharing** page.

1. Go to **My Client Groups > Goals**.
2. Use 1 of these tasks depending on whether your organization has enabled combined administrator pages for performance and development goals or not:
 - o **Setup of Goals Mass Processes:** If combined pages are enabled
 - o **Setup of Performance Goals Mass Assignment and Mass Sharing:** If combined pages aren't enabled
3. If combined administrator pages are enabled, on the **Setup of Goals Mass Processes** page, ensure that **Performance** is selected in the **Type** filter.
4. Select **Add**.

You can see the **New Mass Assignment or Mass Share Goals Process** page.
5. Select the process type as **Mass share goals**.
6. Specify these details:
 - o A unique process name
 - o Review period
7. In the **Who do you want to include?** section, add employees with whom you want to share the performance goals.
 - a. Select the person with whom you want to share the goals.
 - b. Select one of these options to indicate with whom you want to share the goals:

- **Self:** To share with only the selected employee
- **Direct Reports:** To share with only persons who directly report to the selected employee
- **Self and Direct Reports:** To share with the selected employee and all direct reports of the selected employee
- **All Reports:** To share with both the direct and indirect reports of the selected employee
- **Self and All Reports:** To share with the selected employee and all direct and indirect reports of the selected employee

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

c. Save your changes.

8. In the **Who do you want to exclude?** section, add employees with whom you don't want to share the performance goals.
9. In the **Goals** section, add goals to share.
10. Add eligibility profiles to restrict the goal share to employees who conform to the added eligibility profiles.
11. Select **Create**.

Schedule a Mass Share Process for Performance Goals

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

1. Go to **My Client Groups > Goals**.
2. Use 1 of these tasks:
 - o **Scheduled Processes for Goals** task: If your organization has enabled combined administrator pages for performance and development goals.
 - o **Scheduled Processes for Performance Goals** task: If your organization hasn't enabled combined administrator pages for performance and development goals.
3. Select the process type as **Mass assign or share performance goals**.
4. Select the process that you want to schedule.
5. Submit the process.