Oracle Talent Management Cloud
Implementing Goal Management

19C
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Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Using Applications Help

Use help icons ☰ to access help in the application. If you don’t see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons. You can also access Oracle Applications Help.

Watch: This video tutorial shows you how to find help and use help features.

You can also read Using Applications Help.

Additional Resources

- **Community:** Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.

- **Guides and Videos:** Go to the Oracle Help Center to find guides and videos.

- **Training:** Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
</tbody>
</table>

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website.

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.
Contacting Oracle

Access to Oracle Support
Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions
Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 Introduction

Overview of Implementing Goal Management

This guide describes the setup and implementation tasks of Oracle Fusion Goal Management. Using the tasks described in the guide, you can define goals that support common objectives of an organization.

Oracle Fusion Goal Management Cloud Service is part of the Workforce Development offering of Oracle Human Capital Management Cloud. To start an implementation of Oracle Human Capital Management Cloud, a user with the Application Implementation Consultant role (ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB) must opt into the offerings applicable to your business requirements. Refer the Oracle Applications Cloud Using Functional Setup Manager guide to manage the opt-in and setup of your offerings.

This topic includes:

- Prerequisite tasks and related information about implementing Oracle Fusion Goal Management Cloud
- Description of the Goal Management functional area

Prerequisites

Before setting up Oracle Fusion Goal Management Cloud Service, you must implement either:

- HCM Base
- Talent Management Base

You are also required to configure other applications and elements. The table lists sources of information, including guides and help topics, and a description of what they contain, to help you set up the configuration that fits your business needs and processes.

<table>
<thead>
<tr>
<th>Source</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle HCM Cloud Getting Started with Oracle Talent Management Cloud</td>
<td>Provides an overview of Talent Management Cloud options, purchasing and activation options, basic information for implementing Talent Management applications, and describes work areas.</td>
</tr>
<tr>
<td>Oracle Talent Management Cloud Implementing Talent Management Base</td>
<td>Describes user and role synchronization, implementation user setup, enterprise and workforce structures, workforce profiles, approvals, help configuration, and more.</td>
</tr>
<tr>
<td>Oracle Global Human Resources Cloud Implementing Global Human Resources</td>
<td>Describes user and role synchronization, implementation user setup, enterprise and workforce structures, workforce profiles, approvals, help configuration, and more.</td>
</tr>
<tr>
<td>Human Capital Management Cloud Integrating with Oracle HCM Cloud</td>
<td>Describes integration types, how to use file-based and spreadsheet loaders, integrations with Oracle Taleo Recruiting Cloud Service, web services, and coexistence.</td>
</tr>
<tr>
<td>Human Capital Management Cloud Securing Oracle HCM Cloud</td>
<td>Describes Oracle Human Management Cloud security, types of roles and how to create them, managing user accounts, types of security profiles and managing them and Oracle Fusion Transactional Business Intelligence and Business Intelligence Publisher security.</td>
</tr>
</tbody>
</table>
Workforce Development Offering

Use this offering to configure your employee profiles, manage goals, review employees performance, and manage their succession plans. The following table describes the primary features of Worker Goal Setting offering explained in this guide. For the full list of functional areas and features in this offering, use the Associated Features report that you review when you plan the implementation of your offering.

<table>
<thead>
<tr>
<th>Functional Area</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define Worker Goal Setting</td>
<td>Use this functional area to configure worker goal settings such as lookups, descriptive flexfields, profile options, goal value sets, goal library, and goal management notification settings.</td>
</tr>
</tbody>
</table>

Related Topics
- Plan Your Implementation

Guide Structure

This topic includes the guide structure, summary of each chapter, and describes where to find additional information for the tasks in the Define Worker Goal Setting functional area.

The primary features of the Workforce Development offering are explained in this guide. For the full list of functional areas and features in this offering, use the Associated Features report that you review when you plan the implementation of your offering. This topic describes the contents of each chapter included in the following sections of the guide:
- Introduction
- Goal Management Settings
- Goal Management Application Implementation

Introduction

The following table provides the chapter number, chapter name, and chapter contents.

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Title</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Overview and Integrations</td>
<td>An overview of Oracle Fusion Goal Management implementation and description of how it integrates with other applications</td>
</tr>
</tbody>
</table>

Goal Management Settings

The following table provides the chapter number, chapter name, and chapter contents.
Goal Management Application Implementation

The following table provides the chapter number, chapter name, and chapter contents.

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Title</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>Date Format for Goals</td>
<td>Describes how to change the default date format used for</td>
</tr>
<tr>
<td></td>
<td></td>
<td>goals at the site level and at the user level</td>
</tr>
<tr>
<td>7</td>
<td>Goal Management Integrity Validations</td>
<td>Describes how to validate the data integrity after populating the Goal Management data tables</td>
</tr>
</tbody>
</table>
2 Overview and Integrations

Overview of Worker Goal Settings

In the Define Worker Goal Setting activity, HR specialists and implementors perform setup and maintenance tasks related to Oracle Fusion Goal Management. Implementors can use the Setup and Maintenance work area and HR specialists can also use both the Setup and Maintenance and Goals work areas to manage the following objects:

- The goal library
- Goal plans
- Eligibility profiles

For setup tasks only, the HR specialist and implementors can:

- Set profile options to specify the Goal Management features that your organization will use, such as the goal library, and goal plans, and approvals.
- Manage common lookups and update those that have user or extensible configuration levels.
- Manage email notification settings that are sent to workers and managers reminding them of upcoming events and approvals.

For the setup tasks, use the Setup and Maintenance work area to access the tasks in the Define Worker Goal Setting task list.

Related Topics
- Goal Library
- Goal Plans
- Mass Assignment of Performance Goals
- Goal Lookups
- Goal Management Profile Options

Social Networking with Performance Goals

If the page for editing a performance goal has a Social link, you can invite others to collaborate about the goal using social collaboration. Conversations remain with the goal as a historical record.

Examples of collaboration:

- A worker asks the manager to clarify objectives.
- The manager suggests actions for the worker to take toward goal achievement.
- A worker asks peers for advice on setting and achieving performance goals.
Collaborating about Goals

Tips for collaborating:

- To get started, click **Social** on the page for editing a goal. Click the **Share** button, or click **Join** if collaboration is in progress.
- Click the name of the goal to access its wall, where you can start conversations and add members.
- After collaboration starts for a performance goal:
  - Anyone at your company can be invited to participate in a conversation about it.
  - A peer can only participate in conversations after being invited as a member.
  - The worker and the manager can initiate conversations and invite members.
- On the wall of the performance goal, everyone invited can view basic attributes of the goal and post documents and comments that all members can see.

Related Topics

- **What does social networking have to do with my job**

How Goal Management Works with Profiles

The Goals work area uses predefined content types Licenses and Certifications, Competencies, and Languages as target outcomes. Target outcomes are content types that contain content items and maintained in the Profiles work area. Target outcomes help workers add or improve requisite skills, competencies, certifications, or other qualifications. Depending on content section access settings for your role, you can add target outcomes to performance goals.

After a worker completes a performance goal, the worker’s person profile is updated to include the content item that the target outcome addresses. If the content item exists in the worker’s person profile, the profile is updated to include new or changed information.

To use Licenses and Certifications, Competencies, or Languages content type as a target outcome in the Goals work area:

- The relevant subscriber code must be used to access the Profiles functional area from the Goals work area.
- The use of target outcomes must be enabled for the Goals work area. You enable target outcomes for the Goal work area by using profile options.
- Your role must have access to the content type. You set content section access settings for a job or abstract role by using the Manage Profile Content Section Access task in the Setup and Maintenance work area.
- The Goals content type must have a relationship with the content type. You add a relationship between the Goals content type and the corresponding content type in the Profiles work area.
The figure shows how the application adds the Customer Focus competency from the content library to a goal as a target outcome, and then to the worker profile when the goal completes.

Adding Target Outcomes to Performance Goals

If allowed, you can add target outcomes to goals when adding or editing performance goals for a worker. You can select target outcomes from the available list of content types competencies, languages, and licenses and certifications only. The content types available to you depend on the content section access settings for your role.

If allowed, you can also add target outcomes to performance goals when:

- Adding goals to the goal library
- Adding goals to a goal plan when creating or populating the plan
• Mass assigning goals
• Administering goals

Updating Worker Profiles

When the performance goal is completed, and approved if approvals are required, then the worker’s person profile is updated to include the target outcomes. For content items that require a rating level, such as competencies, the manager must select a rating level, which is the rating level associated with the content item. If approvals aren’t enabled for completing the percentage completion of a goal, the worker can also rate the competency associated with the goal. The evaluation type displayed for the competency is Self when the worker rates the competency.

Note: If you delete a goal, the ratings associated with a competency aren’t deleted from the worker’s profile. Depending upon the evaluation type, the user who rated the worker’s competency can delete or update the rating on the worker’s person profile even after the goal is deleted.

Related Topics
• How can I define a relationship between the Goals content type and other content types
• Content Types
• Content Items
• Goal Management Profile Options

How Performance Documents Work with Goals

During a performance evaluation, the line manager or worker can update a performance document to include performance goals and development goals. Workers and managers can create goals directly in the performance document. If Oracle Fusion Goal Management or Oracle Fusion Career Development are used, workers and managers can add goals from the goal library and the worker’s goals from those business processes. Workers and managers can maintain goals either in the performance document or using the goal management and career development business processes, and the goals are updated in the respective business process.

In the performance document:
• Performance goals are maintained in the Performance Goals section
• Development goals are maintained in the Development Goals section
The figure shows how performance documents integrate with the goal management and career development business processes, and how goals update the worker profile.

**Manager Record Requirements**
To use the performance management business process to manage performance documents, workers must have both a job and a line manager on their assignment record.

**Adding Goals to the Performance Document**
Depending on configuration, goals can be added to performance documents in these ways:

- The performance template can include performance and development goals that are added directly to the performance document.
Workers and managers can add performance and development goals directly to a performance document.

Workers and managers can import performance and development goals from the workers' other performance documents.

Workers' performance goals from Goal Management populate the performance document.

Workers' development goals from Career Development populate the performance document.

When created, the performance document may contain goals that the performance template is configured to provide. If Goal Management is used, the goals in the Performance Goals section may include the worker’s own performance goals and others selected from the goal library. If Career Development is used, the goals in the Development Goals section may include the worker’s own development goals or others added from the goal library. Only approved performance and development goals populate the performance document, if approvals are used in the goal management and career development business processes.

During the evaluation process the worker and manager can create goals, and add goals from the goal library, if it’s enabled. If they add a goal to the Performance Goals section, it becomes a performance goal. If they add a goal to the Development Goals section, it becomes a development goal. The worker and manager can also use the Import Goals and Competencies action to copy the worker’s goals (but not ratings or evaluation comments) from another of the worker’s performance documents. The Import Goals and Competencies action creates a new goal, but copies its key attributes from an existing goal in another performance document. The action is found on the pages used to evaluate the worker or set document content.

Performance and development goals created in a performance document aren’t added to the goal library and aren’t visible there. The performance goal can be viewed from the worker’s person spotlight and on all other pages where the goal is included except in the library. Development goals can be viewed only on the Career Development pages.

Updating Performance Documents from Goal Management

Performance and development goals that workers or managers add or edit in Goal Management, Career Development, or in performance documents are maintained such that they are consistent in their respective applications. For example, primary goal characteristics, such as the goal name, description, success criteria, and completion date, are kept identical in both locations. Any attachments to goals are also displayed in the performance document.

The goal details held in performance documents and the goal management or career development business processes have some differences:

- Goal ratings that the worker or manager provides in the performance document aren’t available on the Goal Management or Career Development pages.
- Performance goal weights added on the Goal Management pages are added to the performance document when the goal is initially added to the document. Afterward, the weights from Goal Management update in the performance document, if configured to do so, when the manager or worker uses the Update Goals and Competencies action in the performance document.
- Evaluation comments added to the performance document don’t show on the Goal Management or Career Development pages. However comments from the Goal Management and Career Development pages appear in the performance document.

Workers and managers can add performance goals on the Goal Management pages and the goals are pulled into the workers’ performance documents when the documents are created. Goal plans are required to manage goals in Goal Management. The goals in a goal plan associated with the review period and document type selected for the performance document appear in the document when it’s created.

Development goals from Career Development populate the performance document when the dates of the development goal overlap any portion of the performance document dates. For example, a development goal with a start date before the performance document start date and either an end date after the performance document end date, or no end date, is pulled
into the performance document. Future development goals that start after the performance document concludes and those that are inactive can also populate the performance document, if configured to do so.

When managers or workers edit the worker’s existing goals in Goal Management or Career Development, the changes are reflected in the performance document when it’s opened. To copy new goals into the performance document from the goal management or career development business processes they must use the Update Goals and Competencies action in the performance document. Goals aren’t automatically removed from the performance document and must be manually removed.

Updating Goal Management from Performance Documents

Updates made to the performance document are displayed in Goal Management and Career Development when the performance document is saved or submitted.

When a worker or manager adds a performance goal to the performance document, they can select the goal plan to which to add the goal. The selected goal plan must be one of those that were used to populate the performance document.

Updating Profiles from a Completed Evaluation

When the performance document is completed the application updates the worker’s profile to include the goals section ratings for both the Performance Goals and Development Goals sections. Ratings for individual goals are maintained in the performance document only.

Completing Goals in the Performance Document

When the performance document is completed the performance goals are updated in Goal Management and development goals are updated in Career Development. After that process concludes, managers and workers can’t update goals in the performance document either directly, or by using Goal Management or Career Development. They can continue to add or update goals in Goal Management or Career Development, but those changes aren’t reflected in the performance document.

Setting Up the Performance Template to Use Goals

To manage goals in performance documents, implementors must:

- Create a Performance Goals performance template section to manage performance goals and add it to the performance template.
- Create a Development Goals performance template section to manage development goals and add it to the performance template.

To use Goal Management and the goal library with performance documents, they must also:

- Enable the Goal Management Business Process Enabled (HRG_USE_GOAL_MANAGEMENT) profile option using the Manage Administrator Profile Values task.
- Enable the Goal Library Enabled (HRG_ENABLE_GOAL_LIBRARY) profile option.
- Select the Populate with worker goals check box in the Performance Goals performance template section.
- Optionally, select the Allow update goals action to update goal weights from goal management business process check box in the Performance Goals performance template section.
- Select a review period and performance document type for the template associated with a goal plan for the performance template period.
To use Career Development and the goal library with performance documents, implementors must:

- Enable the Goal Library feature choice in the Workforce Development offering.
- Select the **Populate with workers development goals covering any part of evaluation period** check box in the Development Goals performance template section.
- Optionally select the **Include future development goals starting after evaluation period** and **Exclude inactive development goals** check boxes in the Development Goals performance template section.

**Related Topics**

- Guidelines for Setting Up Performance Templates
- How You Remove Goals Contained in a Performance Document
- How Performance Documents Work with Profiles
3 Descriptive Flexfields

Descriptive Flexfields for Oracle Fusion Goal Management

Use descriptive flexfields to add company-defined attributes for a performance goal entity, such as goals, goal access, and goal plans, and define validation and display properties for them. For example, you can create a descriptive flexfield to distinguish between goals that are for projects, or those for a half year or full year.

Defining Descriptive Flexfield Segments

Use the Manage Descriptive Flexfields task in the Set up and Maintenance work area to define a segment for a descriptive flexfield for goals. You can add more information related to goals and goal plans.

Oracle Fusion Goal Management includes the following two descriptive flexfields.

<table>
<thead>
<tr>
<th>Descriptive Flexfield</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRG_GOALS</td>
<td>Fields for goal information appear on the My Goals page.</td>
</tr>
<tr>
<td>HRG_GOAL_PLANS_B</td>
<td>Fields for goal plan details appear on the Create and Edit Performance Goal Plan pages.</td>
</tr>
</tbody>
</table>

Activating Descriptive Flexfields

To activate a descriptive flexfield, you must also define lookup codes and value sets along with the descriptive flexfield segment. For more information on using flexfields for company-defined attributes, see the Oracle Fusion Applications Extensibility Guide.

Related Topics

- Overview of Descriptive Flexfields
- Overview of Flexfields
4 Profile Options

Goal Management Profile Options

Use the profile options of Oracle Fusion Goal Management to control how your organization uses this functional area.

When you specify appropriate values for the different profile options of Oracle Fusion Goal Management, you can do these configurations:

- Enable or disable Oracle Fusion Goal Management components such as goal plan sets and organization goals.
- Enable or disable different actions such as sharing and alignment of performance goals.
- Enable or disable different features such as target outcomes and goal measurements.
- Set which features require manager approvals.
- Control editing of completed performance goals.
- Control matrix management of performance goals.
- Optimize performance during assignment of goals and goal plans.

This topic lists the various profile options of Goal Management grouped according to their purpose. The tables in this topic describe the effects of enabling and disabling these profile options.

Profile Options for Goal Components

<table>
<thead>
<tr>
<th>Profile Option Code</th>
<th>Profile Option Display Name</th>
<th>Default</th>
<th>Effect of Enabling</th>
<th>Effect of Disabling</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRG_ENABLE_GOAL_LIBRARY</td>
<td>Goal Library Enabled</td>
<td>Y</td>
<td>HR specialists can create goals in the central repository. This can be reused by other workers in the organization.</td>
<td>A goal library can't be created or used. Users must create performance goals individually. This also applies to goals added to performance documents or a talent review.</td>
</tr>
<tr>
<td>HRG_ENABLE_ORGANIZATION_GOAL</td>
<td>Organization Goals Enabled</td>
<td>Y</td>
<td>Makes organization goals available to use.</td>
<td>Users can't access existing organization goals or add new ones.</td>
</tr>
<tr>
<td>HRG_USE_GOAL_PLAN_SET</td>
<td>Goal Plan Sets Enabled</td>
<td>N</td>
<td>HR specialists can create a goal plan set, add goal</td>
<td>The goal plan set feature isn't available for use.</td>
</tr>
</tbody>
</table>
### Profile Options for Goal Actions

<table>
<thead>
<tr>
<th>Profile Option Code</th>
<th>Profile Option Display Name</th>
<th>Default</th>
<th>Effect of Enabling</th>
<th>Effect of Disabling</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRG_ENABLE_GOAL_ALIGN</td>
<td>Goal Alignment Enabled</td>
<td>Y</td>
<td>Workers and managers can align their own goals with those of their managers, colleagues, or the organization.</td>
<td>Prevents any new goal alignment.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Note: Existing goal alignments are retained.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Goal Sharing Enabled</td>
<td>Y</td>
<td>Workers and managers can share their goals with others in the organization.</td>
<td>Prevents any new goal sharing.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Note: Existing goal shares are retained.</td>
<td></td>
</tr>
</tbody>
</table>

### Profile Options for Goal Features

<table>
<thead>
<tr>
<th>Profile Option Code</th>
<th>Profile Option Display Name</th>
<th>Default</th>
<th>Effect of Enabling</th>
<th>Effect of Disabling</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRG_ENABLE_TASK</td>
<td>Goal Tasks Enabled</td>
<td>Y</td>
<td>Users can add tasks to performance goals.</td>
<td>Users can't add tasks to performance goals.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Note: Users can see tasks already added to a performance goal, but can't edit them.</td>
<td></td>
</tr>
<tr>
<td>HRG_ENABLE_OUTCOMES</td>
<td>Goal Target Outcomes Enabled</td>
<td>Y</td>
<td>Users can add target outcomes to performance goals.</td>
<td>Users can't add target outcomes to performance goals.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Profile Options for Goal Management

<table>
<thead>
<tr>
<th>Profile Option Code</th>
<th>Profile Option Display Name</th>
<th>Default</th>
<th>Effect of Enabling</th>
<th>Effect of Disabling</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRG_ENABLE_MULTIPLE_MEASUREMENT</td>
<td>Multiple Measurements for Goals Enabled</td>
<td>N</td>
<td>Users can add multiple measurements to goals.</td>
<td>Users can't add multiple measurements to goals.</td>
</tr>
<tr>
<td>HRG_ALLOW_DECIMALS_IN_WEIGHTS</td>
<td>Decimals in Goal Weights Allowed</td>
<td>Y</td>
<td>Users can enter decimal values when entering weights for performance goals. For example, user can set the weight of a goal to 22.5.</td>
<td>Users can't enter decimal values when entering weights for performance goals.</td>
</tr>
</tbody>
</table>

**Note:** Users can see target outcomes already added to a performance goal, but can't edit them.

**Note:** After you enable this option, users can see all the earlier multiple measurements, if added.

**Note:** When you disable this option, even if multiple measurements exist for a goal, users can see only the earliest measurement added to the goal.

### Profile Options for Goal Approvals

<table>
<thead>
<tr>
<th>Profile Option Code</th>
<th>Profile Option Display Name</th>
<th>Default</th>
<th>Effect of Enabling</th>
<th>Effect of Disabling</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRG_KEY_ATTR_CHG_REQ_APPR</td>
<td>Require Manager Approval for Changes to Key Goal Fields</td>
<td>N</td>
<td>Manager needs to approve any edits made to the key goal attributes such as goal name and start date.</td>
<td>Workers can edit key goal fields added by them without manager approval.</td>
</tr>
</tbody>
</table>

**Note:** If the manager doesn’t approve, the changes made by the user are reverted.

<table>
<thead>
<tr>
<th>Profile Option Code</th>
<th>Profile Option Display Name</th>
<th>Default</th>
<th>Effect of Enabling</th>
<th>Effect of Disabling</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRG_ADD_GOAL_REQ_APPR</td>
<td>Require Manager Approval for Adding a New Goal</td>
<td>N</td>
<td>Manager needs to approve any performance goal addition.</td>
<td>Workers can add performance goals without manager approval.</td>
</tr>
<tr>
<td>Profile Option Code</td>
<td>Profile Option Display Name</td>
<td>Default</td>
<td>Effect of Enabling</td>
<td>Effect of Disabling</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------</td>
<td>---------</td>
<td>-------------------</td>
<td>-------------------</td>
</tr>
</tbody>
</table>
| HRG_GOAL_COMPLN_REQ_APPR | Require Manager Approval for Updating Goal Status to Completed | Y       | Workers require manager’s approval for these actions:  
- Changing the goal status to Completed  
- Deleting a goal  
- Adding a new goal with the status as Completed  
|                     |                             |         | Workers don’t require manager’s approval for these actions:  
- Changing the goal status to Completed  
- Deleting a goal  
- Adding a new goal with the status as Completed |
| HRG_CANCEL_GOAL_REQ_APPR | Requires Manager Approval to Cancel a Goal | N       | Manager needs to approve any performance goal cancellation.  
|                     |                             |         | Workers can cancel goals added by them without manager approval. |
| HRG_DELETE_GOAL_REQ_APPR | Require Manager Approval for Deleting a Goal | N       | Manager needs to approve any performance goal deletion.  
|                     |                             |         | Workers can delete goals added by them without manager approval. |

*Note:* If the manager doesn’t approve, the added goal is removed.

*Note:* If the manager doesn’t approve, the worker’s actions are reverted.

*Note:* If the manager doesn’t approve, the goal cancellation is reversed.

*Note:* If the manager doesn’t approve, the goal isn’t deleted.
### Profile Option for Editing a Completed Goal

<table>
<thead>
<tr>
<th>Profile Option Code</th>
<th>Profile Option Display Name</th>
<th>Default</th>
<th>Effect of Using the Default Value</th>
<th>Effect of Using the Other Values</th>
</tr>
</thead>
</table>
| HRG_COMPLETED_GOAL_EDIT_OPTIONS | Completed Goal Edit Options | Reopen | Users need to click the Reopen button to edit completed performance goals. | - **Always Open:** Users can always edit completed goals.  
- **Never:** Users can't edit completed goals. |

### Profile Option for Matrix Management of Goals

<table>
<thead>
<tr>
<th>Profile Option Code</th>
<th>Profile Option Display Name</th>
<th>Default</th>
<th>Effect of Enabling</th>
<th>Effect of Disabling</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRG_ENABLEMATRIX_MGMT</td>
<td>Matrix Management Enabled for Goals</td>
<td>N</td>
<td>Matrix managers can manage goals.</td>
<td>Matrix managers can't manage goals.</td>
</tr>
</tbody>
</table>

### Profile Options for Goal Assignment

<table>
<thead>
<tr>
<th>Profile Option Code</th>
<th>Profile Option Display Name</th>
<th>Default</th>
<th>Effect</th>
</tr>
</thead>
</table>
| HRG_ONLINE_PROCESS_THRESHOLD | Online Processing Threshold | 25 | Specifies the maximum number of goal records that can be automatically processed.  
The number of goal records to process is calculated using this formula: Number of goals x Number of assignees.  
This value applies for these use cases:  
- The HR specialist mass assigns goals or creates goal plans.  
- Managers add or assign goals.  
- Organization owners assign goals. |
<table>
<thead>
<tr>
<th>Profile Option Code</th>
<th>Profile Option Display Name</th>
<th>Default</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRG_GP_MAX_THREADS</td>
<td>Maximum Number of Threads for a Multithreaded Goals Batch Process</td>
<td>4</td>
<td>Specifies the maximum number of threads for a batch process that assigns goals or goal plans. Valid values are from 2 to 8 for multithreaded and 0 or 1 for a single threaded process.</td>
</tr>
<tr>
<td>HRG_GP_MINCOUNT_EACHTHREAD</td>
<td>Minimum Number of Assignments for Each Thread in a Multithreaded Goals Batch Process</td>
<td>5000</td>
<td>Specifies the minimum number of assignments required for each thread of a multithreaded batch process that assigns goals or goal plans.</td>
</tr>
<tr>
<td>HRG_GP_MINCOUNT_LASTTHREAD</td>
<td>Minimum Number of Assignments for the Last Thread of a Multithreaded Goals Batch Process</td>
<td>1000</td>
<td>Specifies the minimum number of assignments required for the last thread of a multithreaded batch process that assigns goals or goal plans.</td>
</tr>
<tr>
<td>HRG_MASS_REQ_OPTIMIZATION_LEVEL</td>
<td>Performance Optimization Level for Goals Assignment Through a Batch Process</td>
<td>0</td>
<td>Specifies the performance optimization level for mass assignment of goals through a batch process. Set this value to a number between 0 and 3.</td>
</tr>
</tbody>
</table>

*Note:* If the number of records exceeds the threshold, the process is submitted to the scheduled process queue.

Here’s what you indicate when you set this profile option to any of these values:

- **0**: Show log messages and populate all results data from the process in temporary tables.
- **1**: Show log messages and populate mid-level results data from the process in temporary tables.
- **2**: Suppress log messages and populate high level results data from the process in temporary tables.
- **3**: Suppress log messages and do not populate any results data from the process in temporary tables.
Related Topics

- Performance Goals Alignment
- How You Share Performance Goals
- Goal Plans
- How Performance Documents Work with Goals
- What’s a key performance goal field

Contextual Notes in Application Pages

Enhance Talent Management application pages using the Notes resource catalog component for persons and objects using Oracle Page Composer. The Notes feature is similar to the Feedback feature in employee’s Person Spotlight and Performance Document. The Contextual Notes is an extension of the existing Anytime Feedback feature.

You can embed the Notes component on persons and objects using Oracle Page Composer. The Notes component appears with the title, Feedback or Notes, based on the component configuration, Person Notes and Object Notes.

The following image shows the person notes embedded in the Goal Details page:

![Goal Details Page with Feedback](image)

You can create and share notes about employees by configuring the Notes resource catalog component in the following Talent Management scenarios:

- Notes for an employee in the context of an employee’s performance goal
- Notes for an employee in the context of a performance goal plan
- Notes for an employee in the context of a performance review period
- Notes for an employee in the context of an employee’s development goal
- Notes for an employee in the context of an employee’s career development
You can create and share object notes by configuring the Notes resource catalog component in the following Talent Management scenarios:

- Notes for a talent review meeting
- Notes for a succession plan
- Notes for a talent pool

**Related Topics**

- For more information, see Implementing Contextual Notes in Oracle HCM Cloud Talent Management (2375556.1) on My Oracle Support at https://support.oracle.com
- Contextual Notes

## Use Contextual Notes in an Employee's Performance Goal

An organization implements continuous performance management process. Managers in the organization need to share their feedback on the performance of the employees throughout the review period. To facilitate this feature, you can embed Contextual Notes in the Goal Details page and configure it with the performance goal. You must provide the expressions for Object ID and Context ID. You can choose any string for Context Type. If you select ORA_PERFORMANCE_GOAL value, the workers will also view notes in the Check-In documents for the goal.

The following table summarizes the key decisions for this scenario.

<table>
<thead>
<tr>
<th>Decisions to Consider</th>
<th>In This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Which Notes do you want to add to the performance goal?</td>
<td>Person Notes</td>
</tr>
<tr>
<td>What are the visibility settings for the Notes component?</td>
<td>Everyone can view it</td>
</tr>
<tr>
<td>Do you want to change the default Visibility setting?</td>
<td>No</td>
</tr>
</tbody>
</table>

This worked example includes details for the following tasks you perform when you add and use the Notes Resource Catalog Component:

1. Adding Notes component to the Goal Details page
2. Configuring contextual notes parameters
3. Creating Notes in the Goal Details page

### Adding Notes Component

The Contextual Notes container exists in the Talent Management application pages. You must add the Notes component, define the context parameters and specify the options to configure it in the application page and define the visibility settings of the note. In this example, you add and configure the Notes component to the performance goal of an employee by performing the following steps:

1. Sign into the application as a user with configuration privileges.
2. In the **Setting and Actions** menu, go to **Administration** and select **Manage Sandboxes**.
3. Create sandbox and then activate it.
4. Navigate to the employee’s Goals page.
5. In the Setting and Actions menu, go to Administration and select Edit Pages.
6. In the Edit Pages window, select the level -- Site, HCMCountry, or HCMOrganization -- at which you want to add the component.
7. From the View menu, select Source.
8. Click Add Content.
9. In the Add Content window, click Add in the Notes component. You can find the Notes component added to the page.

Configuring Person Notes to an Employee's Performance Goal

1. In the page where the Notes component is added, click the wrench icon to configure the contextual parameters. Enter the following expression values for the notes parameters:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Expression</th>
</tr>
</thead>
<tbody>
<tr>
<td>Object Type</td>
<td>PER_PERSON</td>
</tr>
<tr>
<td>Object ID</td>
<td>#{bindings. PersonId. inputValue}</td>
</tr>
<tr>
<td>Context Type</td>
<td>EXAMPLE_PERFORMANCE_GOAL</td>
</tr>
<tr>
<td>Context ID</td>
<td>#{bindings. BaseGoalId. inputValue}</td>
</tr>
</tbody>
</table>

You can capture Notes based on the specified values in Context and Context Type.

2. To define the appearance of the Notes component in the application page, in addition to Resource Catalog component standard features, you can use and specify the following attributes for the Notes component in the Component Properties window:

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Object Title</td>
<td>You can’t change the title text of person notes. The Notes appears as: Feedback for &lt;PERSON NAME&gt;</td>
</tr>
<tr>
<td>Show Details Page</td>
<td>Leave the field blank</td>
</tr>
<tr>
<td>Show Quick Create</td>
<td>Leave the field blank</td>
</tr>
<tr>
<td>View Only</td>
<td>Leave the field blank</td>
</tr>
</tbody>
</table>

You can define the Display Options and Style attributes in the other tabs of this window.

3. Click Apply and then OK.
4. Click Save and Close.

You can override the default Visibility options of Person Notes using the Manage Common Lookups and Manage Feedback Visibility tasks in Functional Setup Manager. In this example, as we are going by default values, we don’t need any changes or overrides to the visibility settings.
Creating Notes in Goal Details Page

After the implementor adds the Notes component to the Goal Details page, an employee, Ravi can find the Feedback link in the Goal Details page. Create a note by performing the following steps:

1. Click the Feedback link in the Goal Details page.
2. The Notes component with the title Feedback for Ravi appears. Enter your comments about the person in the text box.
3. Select Everyone in Visibility list of the notes so that anyone can view this feedback.
4. Click Create Note. The notes is created.

You can create multiple notes and the number of notes is displayed in the Feedback header.

Related Topics

- Page Modification in Configuring and Extending Applications guide
5 Lookups

Goal Lookups

This topic identifies common lookups for the Goal Management and Career Development work areas that have user or extensible configuration levels. Review these lookups, and update them as appropriate to suit enterprise requirements. You manage lookup for goals, both performance and development, by using the Manage Worker Goal Setting Lookups task in the Setup and Maintenance work area.

Goal Lookups

The following table describes goal lookups and which work areas use them.

<table>
<thead>
<tr>
<th>Lookup Type</th>
<th>Description</th>
<th>Configuration Level</th>
<th>Used By</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRG_DEV_GOAL_CATEGORY</td>
<td>Categories of development goals, such as short-term, medium-term, and long-term.</td>
<td>User</td>
<td>Career Development</td>
</tr>
<tr>
<td>HRG_GOAL_MEASUREMENT_LEVEL</td>
<td>Levels of goals, such as target, and stretch.</td>
<td>Extensible</td>
<td>Goal Management and Career Development</td>
</tr>
<tr>
<td>HRG_GOAL_QUANTITATIVE_UOM</td>
<td>Units of quantitative measurement for goals, such as currency, number, and percentage.</td>
<td>Extensible</td>
<td>Goal Management and Career Development</td>
</tr>
<tr>
<td>HRG_GOAL_SOURCE</td>
<td>The source from which the goal was added, such as goal library, worker goals, or organization goals.</td>
<td>Extensible</td>
<td>Goal Management and Career Development</td>
</tr>
<tr>
<td>HRG_GOAL_TASK_TYPE</td>
<td>Categories of task types for goals, such as coaching, project, and research.</td>
<td>Extensible</td>
<td>Goal Management and Career Development</td>
</tr>
<tr>
<td>HRG_PERCENT_COMPLETE</td>
<td>The completion percentage of a goal, such as 0, 25, 50, 75 and 100.</td>
<td>Extensible</td>
<td>Goal Management and Career Development</td>
</tr>
<tr>
<td>HRG_PERF_GOAL_CATEGORY</td>
<td>Categories of performance goals, such as career, education, and skill.</td>
<td>User</td>
<td>Goal Management</td>
</tr>
<tr>
<td>HRG_PRIORITY</td>
<td>Priorities of goals, such as high, medium, and low.</td>
<td>Extensible</td>
<td>Goal Management and Career Development</td>
</tr>
<tr>
<td>HRG_SUB_TYPE_CODE</td>
<td>Subtypes of goals, such as Corporate and Functional.</td>
<td>User</td>
<td>Goal Management</td>
</tr>
<tr>
<td>Lookup Type</td>
<td>Description</td>
<td>Configuration Level</td>
<td>Used By</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
<td>---------------------</td>
<td>---------</td>
</tr>
</tbody>
</table>

6 Date Format for Goals

Change the Date Format Used for Goals

Change the default date format used for goals at the site level or at the user level. When you set the date format at the site level, the setting is applicable to all the users of the application. Setting the date format at the user level applies to the specific user. The user level settings supersede any site level settings for that user.

Site Level

At the site level, an implementor can change the date format for goals using the following procedure:

1. From the Setup and Maintenance work area, Workforce Development offering, enter Set User General Preferences and click the Search icon.
2. Click the Set User General Preferences task.
3. In the Global Admin Preferences page, select the required format for the date in the Date Format field.
4. Click Save. The Last Saved date and time appears.

User Level

At the user level, log into your user account and change the date format for your user account using the following procedure:

1. In the global region, expand the Settings and Actions menu which is next to your user name.
2. Under Personalization, click Set Preferences.
3. From the Preferences page, General Preferences region, click Regional.
4. From the General Preferences: Regional page, select the required format in the Date Format field.
5. Click Save.
7 Goal Management Integrity Validations

Oracle Fusion Goal Management Data Diagnostic Test

After populating the Oracle Fusion Goal Management data tables, you can run the Goal Management Integrity Validations test to validate the data integrity against four categories. This table describes the four validation categories.

<table>
<thead>
<tr>
<th>Validation Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Group</td>
<td>Business group must be valid and exist in the Oracle Fusion Global Human Resources business group table.</td>
</tr>
<tr>
<td>Foreign Key</td>
<td>Foreign key attributes must not be null.</td>
</tr>
<tr>
<td>Field Level</td>
<td>Field level attributes must match the business rules set up in Goal Management.</td>
</tr>
<tr>
<td>Row Count</td>
<td>The row count on the setup tables must be greater than 0.</td>
</tr>
</tbody>
</table>

Run the Goal Management Integrity Validations Test

1. Select Run Diagnostic Tests from the Setting and Actions menu.

   **Note:** You must have access to the Diagnostic Dashboard.

2. Review the generated report and repair or remove any rows that are invalid.
Glossary

**competency**
Any measurable behavior required by an organization, job, or position that a person may demonstrate in the work context. A competency can be a piece of knowledge, a skill, an attitude, or an attribute.

**content item**
An individual quality, skill, or qualification within a content type that you track in profiles.

**descriptive flexfield**
Expandable fields used for capturing additional descriptive information or attributes about an entity, such as a customer case. You may configure information collection and storage based on the context.

**development goal**
A goal that is geared toward facilitating the career growth of individuals so that they can perform better in their current job or prepare themselves for advancement.

**eligibility profile**
A user-defined set of criteria used to determine whether a person qualifies for a benefits offering, variable rate or coverage, compensation plan, checklist task, or other object for which eligibility must be established.

**goal library**
A central repository of reusable goals maintained by the human resource specialist that managers and workers can copy to use for their own goals.

**HR**
Abbreviation for human resource.

**performance document**
Online document used to evaluate a worker for a specific time period. The document contains the content on which the worker is evaluated, which could include goals, competencies, and questionnaires.

**performance goal**
A results-oriented goal, often using specific targets, to assess the level of a worker’s achievement.

**person profile**
A collection of skills, experience, qualifications, work preferences, and career planning information for a worker.
**target outcome**
A specific skill, competency, or certification added to a goal that can be achieved or acquired by the successful completion of the goal.

**task**
An action added to a goal that a worker plans to undertake to help achieve the goal.