

# Oracle Fusion Cloud Talent Management

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## **Implementing Goal Management**

24D



Oracle Fusion Cloud Talent Management  
Implementing Goal Management

24D

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# 1 Introduction

## Overview of Implementing Goal Management

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

Oracle Fusion Cloud Goal Management is part of the Workforce Development offering of Oracle Fusion Cloud Human Capital Management. To start an implementation of Oracle Human Capital Management Cloud, you need to opt into the offerings applicable to your business requirements. Refer the Oracle Fusion Cloud Applications: Using Functional Setup Manager guide to manage the opt-in and setup of your offerings.

This topic provides this information:

- 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 Cloud Goal Management, you must implement one of these bases:

- HCM Base
- Talent Management Base

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

Source	Contents
Oracle Fusion Cloud Talent Management: Implementing Talent Management Base	Describes user and role synchronization, implementation user setup, enterprise and workforce structures, workforce profiles, approvals, help configuration, and more.
Oracle Fusion Cloud HCM: HCM Integrations	Provides an overview of integration types, how to use spreadsheet loaders, integrations with Oracle Fusion Cloud Taleo Recruiting, and web services.
Oracle Fusion Cloud HCM: Securing HCM	Describes Oracle Fusion Cloud HCM security, types of roles and how to create them, managing user accounts, types of security profiles and managing them, and Oracle Fusion Cloud Transactional Business Intelligence and Business Intelligence Publisher security.

### 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.

Functional Area	Description
Define Worker Goal Setting	<p>Use this functional area to configure these worker goal settings:</p> <ul style="list-style-type: none"> <li>• Lookups</li> <li>• Descriptive flexfields</li> <li>• Profile options</li> <li>• Goal value sets</li> <li>• Goal library</li> <li>• Notifications</li> </ul>

*Related Topics*

- [Plan Your Implementation](#)

## Setup Tasks for Implementing Goal Management

To implement Oracle Fusion Cloud Goal Management, you need to have the privileges of an application implementation consultant.

Oracle Fusion Cloud Goal Management is part of the Workforce Development offering of Oracle Fusion Cloud Human Capital Management. Review the tasks listed in this table that are available in the Setup and Maintenance work area before you set up Oracle Goal Management.

Task Name	Description	Recommended Help
Manage Administrator Profile Values	Configure profile options related to Oracle Goal Management.	<i>Goal Management Profile Options</i>
Worker Goal Setting Profile Option Values	Configure profile options related to Oracle Goal Management.	<i>Goal Management Profile Options</i> <i>Guidelines for Creating Goal Plan Sets</i>
Worker Goal Descriptive Flexfields	Define a segment for a descriptive flexfield for Oracle Goal Management.	<i>Descriptive Flexfields for Goals</i>
Worker Goal Setting Lookups	Manage lookups for Oracle Goal Management.	<i>Goal Lookups</i>
Manage Common Lookups	Manage lookups for Oracle Goal Management. Type <b>HRG</b> in the <b>Lookup Type</b> field to find Goal Management lookups.	<i>Goal Lookups</i>
Review Periods	Manage review periods for goal plans and goal plan sets.	<i>Review Periods in Talent Management</i>
Goal Management Notification Settings	Configure notifications for actions done on performance goals.	<i>Goal Notifications</i> <i>Configure Notifications in Goal Management Using Reports</i>



Task Name	Description	Recommended Help
Manage Approval Transactions for Human Capital Management	Configure approval rules for performance goals that are included in goal plans. You can also disable approvals by using the <b>Bypass Approval</b> feature.	<a href="#">Overview of Performance Goal Approval Rules</a> <a href="#">Performance Goal Payload Attributes</a> <a href="#">How You Bypass Approvals for Specific Performance Goal Subprocesses</a>
Manage Task Configurations for Human Capital Management	Set expiration policies for the approval work flow of performance goals.	<a href="#">How You Define Expiration Policies for Performance Goal Approvals</a>
Manage Feedback Visibility	Control the visibility settings for feedback and notes related to performance goals.	<a href="#">Considerations for Configuring Anytime Feedback Visibility Options</a>
Profile Content Section Access	Grant access to content sections for a job or abstract role. You need to do this to enable users to add target outcomes to a goal.	<a href="#">Content Section Access</a>
Configure HCM Data Loader	Control the HCM Data Loader and HCM Spreadsheet Data Loader import and load processes.	<a href="#">HCM Data Loader Configuration Parameters</a>

Use these actions of Transaction Design Studio (TDS) to configure Oracle Goal Management pages:

- Performance Goal Details
- Performance Goal Library

For more information about configuring Oracle Goal Management pages using TDS, refer to the [How You Configure Goal Management Pages Using Transaction Design Studio](#) topic.

You can also configure guided journey tasks for Oracle Goal Management flows. For more information about this, refer to the [Configure Guided Journeys for Goal Management Pages](#) topic.

## Security Reference

The tasks that people can do and the data that they can see on Goal Management pages depend on their roles, duties, and privileges. For information about these factors, see these two guides:

- [Securing HCM](#)
- [Security Reference for HCM](#)

## Structure of Implementing Goal Management Guide

This topic includes the structure and summary of each chapter in the Implementing Goal Management guide.

This guide describes the primary features of the Workforce Development offering. 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 these sections of the guide:

- Introduction
- Oracle Goal Management Settings

- Oracle Goal Management Implementation
- Personalization Using Transaction Design Studio
- Oracle Goal Management Integrations

## Introduction

This table describes the chapter in the introductory section.

Chapter	Title	Contents
2	Overview	Provides an overview of implementing Oracle Fusion Cloud Goal Management

## Oracle Goal Management Settings

This table describes the chapters related to setting up Oracle Fusion Cloud Goal Management and the tasks that you need to do.

Chapter	Title	Contents
3	Descriptive Flexfields	Describes the available flexfields for Oracle Goal Management and where they're used
4	Profile Options	Describes how to configure the profile options for Oracle Goal Management and the effects of the settings
5	Lookups	Describes common lookups for the Goal Management and Career Development work areas that have user or extensible configuration levels
6	Notifications	Lists the notifications that you can enable or disable for performance goals

## Oracle Goal Management Implementation

This table describes the chapters related to some configurations and validations for Oracle Goal Management.

Chapter	Title	Contents
7	Goal Approval Rules	Describes how you can configure approval rules for performance goals
8	Contextual Notes	Explains how you can embed the Contextual Notes component in an employee's goals page

Chapter	Title	Contents
9	Goal Management Diagnostic and Integrity Checks	Describes how to run goal diagnostics and validate the data integrity after populating the Oracle Goal Management data tables

## Personalization Using Transaction Design Studio

Chapter	Title	Contents
10	Personalization Using Transaction Design Studio	Explains the actions to use in Transaction Design Studio to configure Oracle Goal Management pages.

## Oracle Goal Management Integrations

Chapter	Title	Contents
11	Integrations	Describes how Oracle Goal Management integrates with other applications



## 2 Overview

### Overview of Worker Goal Settings

As an application implementor, you need to configure some goal settings before anyone can work with worker goals.

Use the Define Worker Goal Setting task in the Setup and Maintenance work area to define these objects related to worker goals:

- Lookups
- Value sets
- Descriptive flexfields
- Profile option values
- Notification settings
- Goal library
- Review periods
- Goal plans

#### *Related Topics*

- [Goal Lookups](#)
- [Goal Plans](#)
- [Goal Management Profile Options](#)
- [Descriptive Flexfields for Goals](#)
- [Overview of Value Sets](#)

### How You Show the Pending Goal Plans Page

As an administrator, use the Structure tool to show or hide the Pending Goal Plans page.

#### Before You Start

Remember to activate a sandbox that has the Structure tool enabled.

#### Show the Pending Goal Plans Page

1. Click **Navigator > Configuration > Structure**.
2. On the Navigation Configuration page, click the **My Client Groups** link.
3. On the Edit Group: My Client Groups page, select the **Quick Actions** tab.

4. Expand the **Talent** node.
5. Locate and click the **Pending Goal Plans** link.  
The Edit Quick Action dialog box appears.
6. Set the value of the **Visible** property to **Yes**.
7. Click **Save and Close** to save your changes and close the Edit Quick Action dialog box.
8. Click **Save and Close** to close the Edit Group: My Client Groups page.
9. Click **My Client Groups > Goals > Pending Goal Plans** to check if you're able to view the Pending Goal Plans page.
10. If the Pending Goal Plans page opens, publish the sandbox.

#### Related Topics

- [Create a Sandbox and Make It Active](#)

## Configure Performance Goal Library List of Values

As administrators, you can configure the attributes by which users can search for performance goals to add from the goal library.

You can specify the attributes that users can see while searching and the attributes that users can use only for searching. Select any of these attributes to search performance library goals:

- Goal name
- Goal category
- Goal subtype
- Business unit
- Department
- Job family
- Legal employer

#### Before you start

You need to have a role with the Access HCM Page Configurator (HRC\_ACCESS\_HCM\_TRANSACTION\_CONFIGURATOR\_PRIV) privilege granted to access the lists of values configuration UI.

#### Here's what to do

1. Select **Performance Goal Library** in the Search Configuration tab of Transaction Design Studio.
2. Select the attributes that you want users to use for searching and displaying in the Search and Display Fields section.

By default, these attributes are available to use for search and display:

- Goal name
- Goal category
- Goal subtype

3. Select the attributes by which users can only search for performance goals in the Search Only Fields section.

**Note:** Users can't see the fields that you select here in the list of values when they search for performance goals to add from the goal library.

#### Related Topics

- [How You Configure List of Values \(LOVs\)](#)

## Deep Links

You can use deep links to provide easy navigation directly to a page in the HCM Cloud application.

You can also use deep links for mobile responsive pages on your intranet, custom and third-party applications, or in a document. This helps people run transactions in the HCM cloud and provides quick access to their HR information.

To access deep links:

1. Open the main menu.
2. Go to **Tools > Deep Links**.
3. Copy the URL for a deep link.
4. Paste the URL in the appropriate location.

When you open Deep Links, you find a list of all available deep links.

## FAQ

### What are the Goal Management related application tasks that I can include in checklists?

You can include Goal Management application tasks in checklists.

You can set the task performers and owners as workers or line managers for these Goal Management tasks.

- **Goals:** Takes the employee or manager to the employee's Goals page
- **Request Feedback:** Takes the employee or manager to the Request Feedback page of the employee





# 3 Descriptive Flexfields

## Descriptive Flexfields for Goals

You can add descriptive flexfields to goals and goal plans.

You can use descriptive flexfields to add your company-specific attributes to an entity. 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.

### Define Descriptive Flexfield Segments

Use the **Worker Goal Descriptive Flexfields** task in the Setup and Maintenance work area to define a segment for a descriptive flexfield for Oracle Fusion Cloud Goal Management and Oracle Fusion Cloud Career Development.

This table describes the descriptive flexfields available by default in Oracle Fusion Cloud Goal Management and Oracle Fusion Cloud Career Development.

Descriptive Flexfield	Description
HRG_GOALS	Worker goals and alignment details. These details appear on the My Goals page.
HRG_GOAL_PLANS_B	Goal plan details appear on pages used to create and edit performance goal plans.

### Deploy Descriptive Flexfields

Remember to deploy the changed or configured flexfield to ensure that the latest definition is available to users.

#### Related Topics

- [Overview of Descriptive Flexfields](#)
- [Considerations for Planning Descriptive Flexfields](#)
- [Considerations for Managing Descriptive Flexfields](#)
- [Overview of Flexfield Deployment](#)



# 4 Profile Options

## Search Logic Profile Options for Client List of Values

You can use the logic `<codeph>CONTAINS</codeph>` to create the client list of values. This returns results containing the characters you enter.

Optionally, for individual list of values, you could change this logic to `<codeph>STARTS WITH</codeph>`, to return results that start with the search characters you enter.

For example, when you search for a person with the name John Smith while using the logic `CONTAINS`, you can search by `'jo'` or `'sm'` or `'th'`. When you use the logic `STARTS WITH`, your search must start with `'j'`.

Use the logic `STARTS WITH` when your list contains thousands of values (more than 15,000 records) to improve the search performance. Or, if you don't partition your data by set ID.

**Note:** If you change the search logic for a client list of values, the logic changes in all pages where the list of values is used.

### Related Topics

- [Search Logic Profile Options for Client List of Values in Global Human Resources](#)

## Goal Management Profile Options

Use the profile options of Goal Management to control how your organization uses this functional area. To configure the profile options, navigate to the Setup and Maintenance work area and use the Manage Administrator Profile Values task.

Specify appropriate values for the different profile options of Goal Management to do these configurations:

- Enable responsive pages.
- Enable or disable 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.
- Control editing of completed 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 Responsive Goal Management

Profile Option Code	Profile Option Display Name	Default	Effect of Enabling	Effect of Disabling
HRG_GOALS_RESPONSIVE_ENABLED	Mobile-Responsive Goals Pages Enabled	Y	You can view the responsive Goal Management pages and features.	You can't view the responsive goal pages and features.

## Profile Options for Goal Components

Profile Option Code	Profile Option Display Name	Default	Effect of Enabling	Effect of Disabling
HRG_ENABLE_GOAL_LIBRARY	Goal Library Enabled	Yes	HR specialists can create goals in the central repository. This can be reused by other workers in the organization.	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.  <b>Note:</b> Users can edit performance goals that were previously added from the goal library.
ORA_HRG_RESTRICT_LIB_GOAL	Restrict Library Goals Enabled	N	Workers and their managers can see only library goals that are relevant to their business unit, department, legal entity, and job family.	Workers and their managers can see all library goals.
HRG_ENABLE_ORGANIZATION_GOAL	Organization Goals Enabled	Yes	Makes organization goals available to use.	Users can't access existing organization goals or add new ones.
HRG_USE_GOAL_PLAN_SET	Goal Plan Sets Enabled	No	HR specialists can create a goal plan set, add goal plans to the set, and assign the set to workers who report to them or who they have access to.	The goal plan set feature isn't available for use.

## Profile Options for Goal Actions

Profile Option Code	Profile Option Display Name	Default	Effect of Enabling	Effect of Disabling
HRG_ENABLE_GOAL_ALIGN	Goal Alignment Enabled	Yes	Workers and managers can align their own goals with those of their managers, colleagues, or the organization.	Prevents any new goal alignment.  <b>Note:</b> Existing goal alignments are retained.
HRG_ENABLE_GRANT_ACCESS	Goal Sharing Enabled	Yes	Workers and managers can share their goals with others in the organization.	Prevents any new goal sharing.  <b>Note:</b> Existing goal shares are retained.
HRG_LOV_SEARCH_SHAREDGOALS_STARTSWITH	Shared goal starts with search Enabled	Y	When sharing goals, you can search for goals that start with the characters specified in responsive Goal Management.	When sharing goals, you can search for goals that contain the characters specified.
ORA_HRG_ENABLE_INLINE_WEIGHT_UPDATE	Enable inline weight update	No	You can edit a goal in a goal plan and edit the goal weight in responsive Goal Management if the <b>Drill Down to Goal Details</b> profile option is disabled.  <b>Note:</b> The <b>Edit Weights</b> action won't be available.	You need to use the <b>Edit Weights</b> action to edit weights of a goal in a goal plan.

## Profile Options for Goal Features

Profile Option Code	Profile Option Display Name	Default	Effect of Enabling	Effect of Disabling
HRG_ENABLE_TASK	Goal Tasks Enabled	Yes	Users can add tasks to performance goals.	Users can't add tasks to performance goals.
HRG_ENABLE_OUTCOMES	Goal Target Outcomes Enabled	Yes	Users can add target outcomes to performance goals.	Users can't add target outcomes to performance goals.

Profile Option Code	Profile Option Display Name	Default	Effect of Enabling	Effect of Disabling
HRG_USE_MEASUREMENTS	Use Goal Measurements	Multiple	<p>Users can add multiple measurements to goals in responsive Goal Management.</p> <p><b>Note:</b> After you enable this option, users can see all the earlier multiple measurements, if added.</p>	<p>The other values are:</p> <ul style="list-style-type: none"> <li>• <b>Single:</b> Users can add only one measurement for a goal.</li> <li>• <b>Disabled:</b> Users can't add any measurement for a goal.</li> </ul>
HRG_ALLOW_DECIMALS_IN_WEIGHTS	Decimals in Goal Weights Allowed	Yes	<p>Users can enter decimal values when entering weights for performance goals. For example, user can set the weight of a goal to <b>22.5</b>.</p>	<p>Users can't enter decimal values when entering weights for performance goals.</p>
HRG_ENABLE_GOAL_DRILLDOWN_VIEW	Drill Down to Goal Details	Yes	<p>Enables drilling down to goal details in responsive Goal Management.</p>	<p>Disables drilling down to goal details. You can view goal details in the expanded mode on the same page.</p> <p><b>Note:</b> Changing the profile option value has no effect on how you view performance goals in performance documents and talent review meetings.</p>
ORA_HRG_DEFAULT_GOAL_SORT_OPTION	Default Sort Option for Performance Goals	Display sequence	<p>Goals are listed in the in the goal plan according to the sort order specified.</p> <p><b>Note:</b> The sort order specified also applies to performance documents in which the goal plan is included that have synchronization of goals enabled.</p>	<p>You can select one of these sort options:</p> <ul style="list-style-type: none"> <li>• Display sequence</li> <li>• Goal name</li> <li>• Goal category</li> <li>• Goal status</li> <li>• Goal weight</li> <li>• Last updated date</li> </ul>

## Profile Option for Editing a Completed Goal

Profile Option Code	Profile Option Display Name	Default	Effect of Using the Default Value	Effect of Using the Other Values
HRG_COMPLETED_GOAL_EDIT_OPTIONS	Completed Goal Edit Options	Never	Users can't edit completed goals.	Users can edit completed goals.

## Profile Options for Goal Assignment

Profile Option Code	Profile Option Display Name	Default	Effect
HRG_ONLINE_PROCESS_THRESHOLD	Online Processing Threshold	25	<p>Specifies the maximum number of goal records that can be automatically processed.</p> <p>The number of goal records to process is calculated using this formula: Number of goals x Number of assignees.</p> <p>This value applies for these use cases:</p> <ul style="list-style-type: none"> <li>The HR specialist mass assigns goals or creates goal plans.</li> <li>Managers add or assign goals.</li> <li>Organization owners assign goals.</li> </ul> <p><b>Note:</b> If the number of records exceeds the threshold, the process is submitted to the scheduled process queue.</p>
HRG_GP_MAX_THREADS	Maximum Number of Threads for a Multithreaded Goals Batch Process	4	<p>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.</p>
HRG_GP_MINCOUNT_EACHTHREAD	Minimum Number of Assignments for Each Thread in a Multithreaded Goals Batch Process	5000	<p>Specifies the minimum number of assignments required for each thread of a multithreaded batch process that assigns goals or goal plans.</p>

Profile Option Code	Profile Option Display Name	Default	Effect
HRG_GP_MINCOUNT_LASTTHREAD	Minimum Number of Assignments for the Last Thread of a Multithreaded Goals Batch Process	1000	Specifies the minimum number of assignments required for the last thread of a multithreaded batch process that assigns goals or goal plans.
HRG_MASS_REQ_OPTIMIZATION_LEVEL	Performance Optimization Level for Goals Assignment Through a Batch Process	1	<p>Specifies the performance optimization level for mass assignment of goals through a batch process. Set this value to a number between 0 and 3.</p> <p>Here's what you indicate when you set this profile option to any of these values:</p> <ul style="list-style-type: none"> <li>• <b>0:</b> Show log messages and populate all results data from the process in temporary tables.</li> <li>• <b>1:</b> Show log messages and populate mid-level results data from the process in temporary tables.</li> <li>• <b>2:</b> Suppress log messages and populate high level results data from the process in temporary tables.</li> <li>• <b>3:</b> Suppress log messages and don't populate any results data from the process in temporary tables.</li> </ul>

*Related Topics*

- [How Performance Documents Work with Performance Goals](#)
- [Performance Goals Alignment](#)
- [How You Share Performance Goals](#)
- [Goal Plans](#)
- [What's a key performance goal field?](#)

## Enable Deleting All Goal Plan Assignees

Goal administrators can't delete all assignees of a goal plans until you enable it. This way you can prevent goal administrators from unintentionally deleting goals for all assignees of a goal plan.

To enable the **Delete All Assignees** action for specific users, you need to create the **HRG\_ALLOW\_DELETE\_ALL\_ASSIGNEES** profile option at **User** level and set it to **Y**.



## Create Profile Option

1. Navigate to the Setup and Maintenance work area.
2. Search for and select the **Manage Profile Options** task.
3. In the Search Results section, click **New**.
4. On the Create Profile Option page, specify the values indicated in this table for the new profile option.

Field	Value
Profile Option Code	HRG_ALLOW_DELETE_ALL_ASSIGNEES
Profile Display Name	A suitable name such as <b>Deleting All Goal Plan Assignees Enabled</b>
Application	Goal Management
Module	Goal Management
Start Date	Current Date

5. Click **Save and Close**.
6. On the Manage Profile Options page, select the **Enabled** and **Updatable** check boxes for the **User** level.
7. Click **Save and Close**.

## Set the Profile Option Value to Y

1. Navigate to the Setup and Maintenance work area.
2. Search for and select the **Manage Administrator Profile Values** task.
3. Search for the **HRG\_ALLOW\_DELETE\_ALL\_ASSIGNEES** profile option code.
4. In the Profile Values section, click **Add**.
5. Specify the values indicated in this table.

Field	Value to Enter
Profile Level	User
User Name	Username of the user for whom you want to enable the option to delete all goal assignees
Profile Value	Y

6. Repeat Steps 4 and 5 for all users you want to enable the option to delete all goal assignees.
7. Click **Save and Close**.



# 5 Lookups

## Goal Lookups

Lookups in Oracle Fusion Cloud Goal Management and Oracle Fusion Cloud Career Development have different configuration levels.

You can use these tasks in the Setup and Maintenance work area to manage lookups for Oracle Fusion Cloud Goal Management and Oracle Fusion Cloud Career Development:

- Worker Goal Setting Lookups
- Manage Common Lookups

You can update lookups that have an extensible configuration level to suit your organization's requirements.

### Worker Goal Setting Lookups

This table describes the goal lookups that you manage using the Worker Goal Setting Lookups task and the work areas that use them.

Lookup Type	Description	Configuration Level	Used By
HRG_DEV_GOAL_CATEGORY	Categories of development goals, such as short-term, medium-term, and long-term.	User	Oracle Career Development
HRG_GOAL_SOURCE	The source from which the goal was added, such as goal library, worker goals, or organization goals.	Extensible	Oracle Goal Management and Oracle Career Development
HRG_GOAL_TASK_TYPE	Type of goal task, such as coaching, project, and research.	Extensible	Oracle Goal Management and Oracle Career Development
HRG_PRIORITY	Priorities of goals, such as high, medium, and low.	Extensible	Oracle Goal Management and Oracle Career Development
HRG_APPROVAL_STATUS	Goal approval status: <ul style="list-style-type: none"> <li>• Pending approval</li> <li>• Approved</li> <li>• Rejected</li> <li>• Draft</li> </ul>	System	Oracle Goal Management and Oracle Career Development

## Common Lookups

This table describes the goal lookups that you manage using the **Manage Common Lookups** task and the work areas that use them.

**Tip:** Type **HRG** in the **Lookup Type** field to find these lookups.

Lookup Type	Description	Configuration Level	Used By
HRG_APPROVAL_STATUS	<p>Goal approval status:</p> <ul style="list-style-type: none"> <li>• Pending approval</li> <li>• Approved</li> <li>• Rejected</li> <li>• Draft</li> </ul>	System	Oracle Goal Management and Oracle Career Development
HRG_COMPL_GOAL_EDIT_OPTIONS	<p>Specifies if you can edit a completed goal:</p> <ul style="list-style-type: none"> <li>• <b>Never:</b> Can't edit a completed goal</li> <li>• <b>Always open:</b> Users can always edit completed goals.</li> <li>• <b>Reopen:</b> Users can edit completed goals only when the goal is reopened.</li> </ul>	System	Oracle Goal Management and Oracle Career Development
HRG_DEV_GOAL_CATEGORY	<p>Category of development goals, such as short-term, medium-term, or long-term.</p>	User	Oracle Career Development
HRG_GOAL_ACCESS_LEVELS	<p>Specifies who can access a goal in the goal library or goal plan:</p> <ul style="list-style-type: none"> <li>• HR specialist</li> <li>• HR specialist and manager</li> <li>• HR specialist, manager, and worker</li> </ul>	System	Oracle Goal Management and Oracle Career Development
HRG_GOAL_ASGN_SOURCE_TYPE	<p>Specifies the source of goal assignment:</p> <ul style="list-style-type: none"> <li>• HR specialist</li> <li>• Manager</li> <li>• Matrix manager</li> <li>• Organization owner</li> <li>• Talent review</li> <li>• Worker</li> </ul>	System	Oracle Goal Management and Oracle Career Development

Lookup Type	Description	Configuration Level	Used By
HRG_GOAL_MEASUREMENT_LEVEL	Levels of goal measurement, such as <b>Target</b> and <b>Stretch</b> .	Extensible	Oracle Goal Management and Oracle Career Development
HRG_GOAL_PLAN_SET_ASSGN_STATUS	Statuses for goal plan set assignment such as <b>Active</b> and <b>Pending</b> .	System	Oracle Goal Management and Oracle Career Development
HRG_GOAL_PLAN_TMPL_STATUS	Status of the goal plan template, which can be <b>Active</b> or <b>Inactive</b> .	System	Oracle Goal Management and Oracle Career Development
HRG_GOAL_QUANTITATIVE_UOM	The quantitative unit of measurement used for the goal: <ul style="list-style-type: none"> <li>• None</li> <li>• Currency</li> <li>• Number</li> <li>• Percent</li> </ul>	Extensible	Oracle Goal Management and Oracle Career Development
HRG_GOAL_QUANT_MEASURE_TYPE	Type of quantitative measurement of goal, which can be <b>Maximum</b> or <b>Minimum</b> .	System	Oracle Goal Management and Oracle Career Development
HRG_GOAL_SOURCE	The source from where the goal was added, such as goal library, individual goals, or organization goals.	Extensible	Oracle Goal Management and Oracle Career Development
HRG_GOAL_STATUS	Status of the goal: <ul style="list-style-type: none"> <li>• Not started</li> <li>• In progress</li> <li>• Completed</li> <li>• Overdue</li> <li>• Canceled</li> </ul>	System	Oracle Goal Management and Oracle Career Development
HRG_GOAL_TASK_STATUS	Status of the goal task: <ul style="list-style-type: none"> <li>• Not started</li> <li>• In progress</li> <li>• Completed</li> <li>• Overdue</li> </ul>	System	Oracle Goal Management and Oracle Career Development
HRG_GOAL_TASK_TYPE	Type of goal task, such as coaching, project, and research.	Extensible	Oracle Goal Management and Oracle Career Development
HRG_GOAL_VERSION_TYPE	Type of goal version: <ul style="list-style-type: none"> <li>• Active</li> </ul>	System	Oracle Goal Management and Oracle Career Development

Lookup Type	Description	Configuration Level	Used By
	<ul style="list-style-type: none"> <li>Frozen</li> <li>Mass request</li> <li>Pending transfer</li> <li>Pending approvals</li> <li>Rejected</li> <li>Requires approval</li> </ul>		
HRG_MEASURE_CALC_RULE	The calculation rule used for goal measurement, which can be <b>Sum</b> or <b>Average</b> .	System	Oracle Goal Management and Oracle Career Development
HRG_PERF_GOAL_CATEGORY	Category of performance goal, such as Education, Career, or Financial.	User	Oracle Goal Management
HRG_PRIORITY	Priorities of goals, such as high, medium, and low	Extensible	Oracle Goal Management and Oracle Career Development
HRG_PROCESS_TYPE	Process types for scheduling goal assignment: <ul style="list-style-type: none"> <li>Mass assign goals</li> <li>Assign goal plans</li> <li>Assign goal plan sets</li> <li>Update goal status to overdue</li> </ul>	System	Oracle Goal Management and Oracle Career Development
HRG_SUB_TYPE_CODE	Specifies goal sub type, such as Corporate and Finance.	User	Oracle Goal Management and Oracle Career Development

*Related Topics*

- [Overview of Lookups](#)

## FAQ for Performance Goal Lookups

### 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.

# 6 Notifications

## Goal Notifications

As an administrator, you can configure notifications for actions done on performance goals. Use the **Goal Management Notification Settings** task in the Setup and Maintenance work area to do this.

When you enable notifications for goal actions, users get notifications through email. They can also use the **Notifications** icon in the global header to view their notifications.

### Profile Options for Goal Management Notifications

To ensure that users receive error-free notifications, you need to set the values of all the profile options listed in this table to **TRUE**.

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

### Goal Management Notifications

This table lists the notifications that you can enable or disable for performance goals.

Notification	Effect of Enabling
HR assigns a goal	The workers get a notification when the HR specialist mass assigns performance goals to them.

Notification	Effect of Enabling
HR cancels a goal	The worker gets a notification when the HR specialist cancels their goal.
HR deletes a goal	The worker gets a notification when the HR specialist deletes their goal.
HR generates goal plan	The workers get a notification when the HR specialist assigns a goal plan to them.
HR generates goal plan set	The workers get a notification when the HR specialist assigns a goal plan set to them.
HR updates a goal	The worker gets a notification when the HR specialist updates their goal.
Manager aligns a goal	The worker gets a notification when their manager aligns their goal to another goal.
Manager assigns a goal	The workers get a notification when their manager assigns a goal to them.
Manager cancels a goal	The worker gets a notification when their manager cancels their goal.
Manager cancels an assigned goal	The worker and their HR specialist get a notification when a manager cancels a goal that was assigned by the HR specialist.
Manager creates a goal	The workers get a notification when their manager creates a goal for them.
Manager creates a note for a worker goal	The worker gets a notification when their manager adds a note to their goal.
Manager deletes a goal	The worker gets a notification when their manager deletes their goal.
Manager deletes a goal assigned by HR	The worker gets a notification when their manager deletes a goal that was assigned to them by their HR specialist.
Manager deletes a note for a worker goal	The worker gets a notification when their manager deletes a note that the manager had added to the worker's goal.
Manager deletes an assigned goal	The HR specialist gets a notification when a manager deletes a goal that was assigned by the HR specialist.
Manager or colleague cancels a goal with alignment	The workers get a notification to realign a goal when their manager or colleague cancels a goal that was aligned by them.
Manager updates a completed goal	The worker gets a notification when their manager updates their completed goal.
Manager updates a goal	The worker gets a notification when their manager updates their goal.
Organization owner publishes a goal	Direct reports of the organization owner get a notification when an organization owner enables a goal for sharing with the organization.
Worker cancels a goal assigned by HR	The HR specialist gets a notification when a worker cancels a goal assigned by the HR specialist.



Notification	Effect of Enabling
Worker completes a goal	The manager gets a notification when a worker reporting to them marks a goal as completed.
Worker creates a goal	The manager gets a notification when a worker reporting to them creates a performance goal.
Worker creates a note to an assigned goal	The manager gets a notification when a worker adds a note to their goal.
Worker deletes a goal assigned by HR	The HR specialist gets a notification when a worker deletes a goal assigned by the HR specialist.
Worker deletes a note to an assigned goal	The manager gets a notification when a worker deletes a note that the worker had added to their goal.
Worker shares a goal	Workers and their managers get a notification when another worker shares a goal with them.
Worker updates a completed goal	The manager gets a notification when any worker reporting to them updates a completed goal.
Worker updates a goal	The manager gets a notification when any worker reporting to them updates their goal.

*Related Topics*

- [How You Manage Your Performance Goals](#)
- [How You Administer Performance Goals](#)
- [Performance Goals Alignment](#)
- [Configure Notifications in Goal Management Using Reports](#)

## FAQ for Notifications

### Why are goal notifications not delivered?

When configuring tasks on the Setup and Maintenance work area, if you disable notifications for participants, then they won't be notified.

In BPM Worklist, search for and select the **GoalNotificationFyi** task. On the Assignees subtab of the Task Configuration tab, click the **Goal Management FYI Routing Participants** node. On the Advanced tab, if the **Ignore Participant** check box is selected, participants won't receive notifications.

*Related Topics*

- [Disable Stages or Participants](#)



# 7 Goal Approval Rules

## Overview of Performance Goal Approval Rules

Use the **Approve Performance Goal** task in the Approval Rules tab of the Transaction Console to view or configure approval rules for performance goals that are included in goal plans. You can also disable approvals by using the Bypass Approval feature.

To configure approval rules, go to **Tools > Transaction Console**.

The **Approve Performance Goal** task includes these two rules which need to be mutually exclusive:

- **PerformanceGoalAutoApproval:** Use to enable autoapproval of performance goals. When the conditions in this rule are satisfied, the application doesn't generate any approval notifications. By default, all the conditions in this rule evaluate to the true state.
- **PerformanceGoalManualApproval:** Use to enforce manual approval of performance goals. When the conditions in this rule are satisfied, approval notifications are generated.

The **Approve Performance Goal** task also has the **Performance Goal Zero Balance Transaction Approval Rule** rule. This rule is triggered when transactions on a single draft goal have reversal actions that nullify the approval submission. We recommend that you don't modify or delete this rule.

By default, **Bypass** is enabled for the **Approve Performance Goal** task. When you disable **Bypass**, all goal plan approval transactions are automatically approved. You can modify the rule set to ensure that performance goal changes are sent for manual approval.

## Enable Manual Approval of Performance Goals

This table lists the basic Performance Goals approval conditions and indicates the value that you need to assign to the condition attribute to enable manual approval.

Approval Condition	Condition Attribute	Attribute Value to Enable Manual Approval
New Goal	Performance Goals.Goal Created Flag	Y
Delete Goal	Performance Goals.Goal Deleted Flag	Y
Cancel Goal	Performance Goals.Status Code	CANCEL
Completed Goal	Performance Goals.Status Code	COMPLETED
Updated Key Attribute	Performance Goals.Legacy Key Attribute Updated	Y

You can configure these conditions to evaluate to the false state by adding the prefix **NOT\_** to the attribute value in the expression. To ensure that the conditions evaluate to the true state, you need to remove the prefix **NOT\_** from the expressions.

## Modify Approval Rule Set of Performance Goals

You can modify the rule set of performance goals to meet your specific approval requirements. Remember to have only one manual approval rule along with the autoapproval rule that's mutually exclusive. You also need to ensure that these two rules don't logically conflict.

## Add a New Performance Goal Condition in the Rule Set

Add additional conditions by building expressions using attributes available in the performance goal payload. You need to add the condition to both the manual and autoapproval rules and ensure that the rules complement each other. Remember that the condition added in the autoapproval rule needs to be the inverse of the condition added to the manual approval rule.

### Related Topics

- [How You Manage HCM Approval Transactions](#)
- [HCM Approval Rules](#)

## Performance Goal Payload Attributes

You use the performance goal payload attributes when defining approval conditions in Transaction Console.

Approval Condition	Condition Attribute	Attribute Value to Enable Manual Approval	Description
New Goal	Performance Goals.Goal Created Flag	Y	Indicates that a goal is created
Updated Goal	Performance Goals.Goal Updated Flag	Y	Indicates that a goal is updated
Delete Goal	Performance Goals.Goal Deleted Flag	Y	Indicates that a goal is deleted
Cancel Goal	Performance Goals.Status Code	CANCEL	Indicates that a goal is canceled
Completed Goal	Performance Goals.Status Code	COMPLETED	Indicates that a goal is completed
Updated Key Attribute	Performance Goals.Legacy Key Attribute Updated	Y	Indicates that key attributes are updated in a goal

Approval Condition	Condition Attribute	Attribute Value to Enable Manual Approval	Description
Success Criteria Updated Flag	Performance Goals.Success Criteria Updated Flag	Y	Indicates that the success criteria of the performance goal is updated
<ul style="list-style-type: none"> <li>Measurement Created Flag</li> <li>Measurement Updated Flag</li> <li>Measurement Deleted Flag</li> </ul>	<ul style="list-style-type: none"> <li>Performance Goals.Measurement Created Flag</li> <li>Performance Goals.Measurement Updated Flag</li> <li>Performance Goals.Measurement Deleted Flag</li> </ul>	<ul style="list-style-type: none"> <li>Y</li> <li>Y</li> <li>Y</li> </ul>	<ul style="list-style-type: none"> <li>Indicates that a goal measurement is added</li> <li>Indicates that a goal measurement is updated</li> <li>Indicates that a goal measurement is deleted</li> </ul>
<ul style="list-style-type: none"> <li>Task Created Flag</li> <li>Task Updated Flag</li> <li>Task Deleted Flag</li> </ul>	<ul style="list-style-type: none"> <li>Performance Goals.Task Created Flag</li> <li>Performance Goals.Task Updated Flag</li> <li>Performance Goals.Task Deleted Flag</li> </ul>	<ul style="list-style-type: none"> <li>Y</li> <li>Y</li> <li>Y</li> </ul>	<ul style="list-style-type: none"> <li>Indicates that a task is added to a performance goal</li> <li>Indicates that a goal task is updated</li> <li>Indicates that a goal task is deleted</li> </ul>
<ul style="list-style-type: none"> <li>Share Created Flag</li> <li>Share Deleted Flag</li> </ul>	<ul style="list-style-type: none"> <li>Performance Goals.Share Created Flag</li> <li>Performance Goals.Share Deleted Flag</li> </ul>	<ul style="list-style-type: none"> <li>Y</li> <li>Y</li> </ul>	<ul style="list-style-type: none"> <li>Indicates if a share request is created for a performance goal</li> <li>Indicates if a shared performance goal has been deleted in the goal plan</li> </ul>
<ul style="list-style-type: none"> <li>Align Created Flag</li> <li>Align Deleted Flag</li> </ul>	<ul style="list-style-type: none"> <li>Performance Goals.Align Created Flag</li> <li>Performance Goals.Align Deleted Flag</li> </ul>	<ul style="list-style-type: none"> <li>Y</li> <li>Y</li> </ul>	<ul style="list-style-type: none"> <li>Indicates if an alignment request is created for a performance goal</li> <li>Indicates if an existing alignment for a performance goal has been marked for deletion</li> </ul>
Goal Source Code	Performance Goals.Goal Source Code	<ul style="list-style-type: none"> <li>HR</li> <li>MANAGER</li> <li>ORA_HRG_HR_MGR</li> <li>ORG_OWNER</li> <li>WORKER</li> </ul>	A code that identifies who added the performance goal to the goal plan, which can be HR specialist, manager, or worker.
Goal Sub Type Code	Performance Goals. Goal Sub Type Code	Any user defined value	<p>A code that indicates the subtype of the performance goal</p> <p><b>Note:</b> You can use subtypes to further classify a goal. You can configure subtypes based on your business requirements.</p>

Approval Condition	Condition Attribute	Attribute Value to Enable Manual Approval	Description
Weighting	Performance Goals.Weighting	A value between 0 and 999	Weight of the goal in the goal plan
Priority Code	Performance Goals.Priority Code	<ul style="list-style-type: none"> <li>• HIGH</li> <li>• MEDIUM</li> <li>• LOW</li> </ul>	Priority of the goal, which can be <b>High, Medium, or Low</b>
Target Completion Date	Performance Goals.Completion Date	A user defined date	Indicates when the performance goal is targeted to be completed
Private Flag	Performance Goals.Private Flag	Y	Indicates that the performance goal is a private goal

## How You Bypass Approvals for Specific Performance Goal Subprocesses

As administrators, you can enable selective bypassing of approvals for performance goals in Transaction Console. You can do this without modifying either the existing autoapproval or manual approval rules of the performance goals rule set.

Your organization may want to commit some performance goal transactions immediately, but may want other transactions to go through the approval flow. For example, your organization may want to allow employees to manage their private goals without any approval, but may want managers to approve other transactions. You enable bypass approvals for the subprocesses that don't need manager's approval.

### Performance Goal Subprocesses for Bypass

When you expand the **Approve Performance Goal** rule in the Approval Rules tab of Transaction Console, you can see these subprocesses that you can enable for bypassing approvals:

- **Add Shared Colleague Goal:** Employee adds a goal that's shared by a colleague to their goal plan.
- **Add Shared Manager Goal:** Employee adds a goal that's shared by their manager with them to their goal plan.
- **Add Shared Organization Goal:** Employee adds a goal that's shared by an organization owner to their goal plan.
- **Goal Align Action:** Employee aligns their goal to a manager's or colleague's goal. Or an organization owner shares a goal with their organization.
- **Goal Cancel Action:** Employee cancels one or more of their goals.
- **Goal Copy Action:** Employee copies one or more of their goals.
- **Goal Delete Action:** Employee deletes one or more goals from their goal plan.
- **Goal Extend Action:** Employee extends one or more goals to another goal plan.

- **Goal Move Action:** Employee moves one or more goals to another goal plan.
- **Goal Share Action:** Employee shares their goal.
- **Manage Goal Measurement:** Employee adds, removes, or updates goal measurements.
- **Manage Goal Outcome:** Employee adds, removes, or updates goal target outcomes.
- **Manage Goal Task:** Employee adds, removes, or updates goal tasks.
- **Manage Organization Goals:** Employee does any action such as add, update, delete, complete, cancel, move, or extend on a shared organization goal.
- **Manage Private Goals:** Employee does any action such as add, update, copy, delete, complete, or cancel on a private goal.

**Note:** You can also see the **Remaining Goal Actions** subprocess. This is for the goal actions other than that listed earlier. But You can't enable or disable **Bypass Approvals** for this subprocess. This only reflects the **Bypass Approvals** setting of the parent **Approve Performance Goal** rule.

## Configure Selective Bypass of Approvals for Performance Goal Subprocesses

Here's how you can selectively bypass approvals for some goal transactions:

1. Go to **Tools > Transaction Console**.
2. Click the **Approval Rules** tab.
3. Search for and select the **Approve Performance Goal** rule.
4. Expand the **Approve Performance Goal** rule.
5. Enable **Bypass Approvals** for the subprocesses that you want to commit immediately.

**Note:** When you enable or disable **Bypass Approvals** for the parent **Approve Performance Goal** rule, **Bypass Approvals** is automatically enabled or disabled for all the subprocesses.

## After You Bypass Subprocesses

When you enable **Bypass Approvals** for any of the subprocesses, the corresponding performance goal transaction is committed immediately. Users who did the subprocess action on the goals in a goal plan won't see the approval user messages on their Goal Plan page nor receive any notifications.

Goal transactions that were in the draft state and pending approval state will continue through the approval flow and ignore the new partial bypass setting.

### Related Topics

- [How You Manage HCM Approval Transactions](#)

## Simulate Performance Goal Approval Rules

You can now simulate approval rules created for performance goals in Transaction Console to test the configured rules and their routing.

Testing rules helps you to incrementally build the approval rule conditional logic. You can assess the impact of the change without having to recreate and submit new transactions.

### Before you start

You need to have a role with the Test Approval Rules (PER\_TEST\_APPROVAL\_RULES\_PRIV) privilege granted to test approval rules.

### Here's what to do

1. On the Approval Rules tab of the Transaction Console, click the **Test Rules** icon for the **Approve Performance Goal** rule. If you're an administrator who can configure rules, you can use the **Test Rules** button on the rule configuration page.

On the Test Approval Rules: Approve Performance Goal page, you can see the saved performance goal transactions and those submitted for approval.

2. Click **Simulate** for the transaction that you want to simulate the approval rule for.

### Results:

The simulation result on the page lists these details:

- Rule name
- Transaction ID
- Implemented rules
- Approval request details
- Approval history
- Approval routing

If the simulation isn't successful, you will see an error message.

### Related Topics

- [How You Manage HCM Approval Transactions](#)

## How You Define Expiration Policies for Performance Goal Approvals

As administrators, you can set expiration policies for the approval work flow of performance goals.

Your organization may want approvers to act on approval requests for performance goals within a specific number of days. You can set a due date, expiration policy, or both:

- If you set a due date, before the due date, the current assignee is reminded to take action. Even after the due date passes, the task doesn't expire. The assignee and any approvers after them, can still act on the task.
- If you set expiration policies, the task can expire based on your settings. After the duration set in the expiration policy is reached, the goal plan is withdrawn from the approval flow. The goal plan is no longer locked. The user who submitted the goal plan changes can review the goal plan, update it, and resubmit the goal plan for approval.



## Define Expiration Policies

You set up expiration policies in the Functional Setup Manager.

1. In the Setup and Maintenance work area, search for and select the **Manage Task Configurations for Human Capital Management** task.
2. In BPM Worklist, on the Task Configuration tab, search for and select the **ApprovePerformanceGoal** task.
3. Click the **Edit** task icon in the **Tasks to be configured** toolbar.
4. Open the **Deadlines** subtab.
5. Set a due date, if needed.
6. Set the expiration policy:
  - a. Expand the Expiration Settings section.
  - b. To ensure that all approvals are done within a certain time frame, select **Task Level**.
  - c. Enter a duration and optionally select the **Exclude Saturday and Sunday** check box.
  - d. Leave the **Expire only** option selected.
7. Click the **Commit** task icon in the **Tasks to be configured** toolbar.

## How You Archive Draft Performance Goal Transactions

As administrators, you need to archive performance goal transactions that have been in the draft state for a long period of time.

Workers in your organization may create goals and not submit them for approval and they may remain in the draft state for many days. Such transactions can accumulate over time and can impact the performance of the Transaction Console. Here's how you ensure that such goals are also archived:

1. Specify the time period in days after which draft transactions become eligible for archiving using the **ORA\_HRC\_ARCH\_DRFT\_PERFORMANCE\_GOALS** profile option.
2. To refresh the transaction status, run the **Refresh Transaction Administrator Console Transaction Status** process.
3. Archive completed performance goal transactions.

## Specify the Time Period for Archiving

The default value of the **ORA\_HRC\_ARCH\_DRFT\_PERFORMANCE\_GOALS** profile option is **180** days. So, draft goals that users haven't submitted for approval for 180 days or more are automatically set to **Completed** status and become eligible for archiving. But you can change the profile option value according to your organizational policy. Remember that you can't retrieve archived goals. So, be thoughtful when you specify a value for the profile option.

To change the archive period for unapproved performance goal transactions in draft state:

1. Navigate to the Setup and Maintenance work area.
2. Search for and select the **Manage Administrator Profile Values** task.
3. Search for and select the **ORA\_HRC\_ARCH\_DRFT\_PERFORMANCE\_GOALS** profile option.
4. Set the **Profile Value** to the number of days you want to allow users to retain their performance goal transactions that are in draft state.
5. Click **Save and Close**.

## Refresh the Goal Transaction Status

The **Refresh Transaction Administrator Console Transaction Status** scheduled process automatically runs every hour to refresh the statuses. If you find that's not enough, you can submit the process to run on a more frequent schedule.

To run the **Refresh Transaction Administrator Console Transaction Status** process:

1. Click **Navigator > Tools > Scheduled Processes**.
2. On the Scheduled Processes Overview page, click **Schedule New Process**.
3. Leave the type as **Job**, then search for and select the **Refresh Transaction Administrator Console Transaction Status** process, and click **OK**.
4. Click **OK**.
5. In the Process Details dialog box, enter at least the required parameters, if any.
6. Click **Submit**.
7. Click **OK** to confirm.

**Tip:** Note down the process ID for your submission so you can easily find it later.

After the **Refresh Transaction Administrator Console Transaction Status** process completes, the status of the draft transactions that are older than the number of days defined in the **ORA\_HRC\_ARCH\_DRFT\_PERFORMANCE\_GOALS** profile option is set to **Completed**. The transactions then become eligible for archiving.

## Archive Completed Goal Transactions

Performance goal transactions are archived according to the period you select in the **Archive Transactions** list of values for the **Approve Performance Goal** rule. If you haven't selected any option to automatically archive performance goal transactions, then you need to run the **Archive Transaction Console Completed Transactions** process to archive the completed goal transactions.

To run the **Archive Transaction Console Completed Transactions** process, follow the steps listed for running the **Refresh Transaction Administrator Console Transaction Status** process. But remember to search and select the **Archive Transaction Console Completed Transactions** process.

After the draft goals are archived, any changes made are reset and the goal plan is set to its previous approval state.

### Related Topics

- [Statuses for Filtering Transactions](#)
- [How Workflow Tasks Are Archived and Purged](#)

## Extract Performance Goals Transaction Data from Approvals Cache

Sometimes a performance goal transaction that's submitted for approval may get stuck. As administrators, you can recover data of such goal transactions from the approvals cache.

You need to run the **Extract Goals Transaction Data from Cache** process which generates an HCM Data Loader (HDL) script. You can copy this to a `.dat` file. Review the `.dat` file and update the success criteria and comments data if needed. Upload the file to recover the goals transaction data.

1. Run the **Extract Goals Transaction Data from Cache** process.
2. Specify the transaction ID of the transaction that you want to recover.
  - Tip:** You can find the transaction ID in the transaction console.
3. Submit the process.
4. When the process completes successfully, open the process log.
5. The log file has the HDL script with the goal details. Copy this to a `.dat` file and save it.
6. Review the `.dat` file:
  - a. You can remove attributes that have no value.
  - b. If a CLOB (character large object) field value's content is greater than 4000 characters, do these steps:
    - i. Move the content to a text file.
    - ii. Change the field name in the METADATA line to the corresponding Goal business object attribute name for the CLOB field. For example, change `CommentsText` to `CommentsFile`, `SuccessCriteriaText` to `SuccessCriteriaFile`, and `LongDescription` to `LongDescriptionFile`.
    - iii. Include the text file name in the value of the CLOB field attribute.
  - c. If a CLOB field value's content is less than 4000 characters, you can change the CLOB column field names in header to the corresponding non-CLOB column field name. For example, you can change `CommentsText` to `Comments` and `SuccessCriteriaText` to `SuccessCriteria`.

For `LongDescription`, because `Description` is already an attribute, treat it as a CLOB field with greater than 4000 characters and do the steps outlined in Step 6b.
  - d. Save your changes.
7. Generate a `.zip` file for your `.dat` file.
8. Discard the performance goal changes or terminate the submitted goal transaction.
9. Import the generated `.zip` file using HDL Import.
  - a. On the Tasks panel tab of the Data Exchange work area, select **Import and Load Data**. You can see the Import and Load Data page.
  - b. Click **Import File**.
  - c. In the Import File dialog box, click **Browse** to search for and select the generated `.zip` file.
  - d. Click **Submit Now**.
10. If the HDL import and load process completes successfully, validate the imported goals data on the Goals page.

## Examples for Configuring Goal Approval Rules

### Example of Changing an Existing Performance Goal Approval Rule

This example shows how you can modify the existing rule set of performance goal approvals to enable manual approval for adding a performance goal.

In your organization, autoapproval has been enabled by default whenever any employee adds a performance goal. But now the management wants to trigger approvals whenever any employee or manager adds a goal. This table summarizes the key decisions for this scenario.

Decisions to Consider	In This Example
Who will approve goal additions?	Managers that the employee reports to
Which approval rules do I need to modify?	Both autoapproval and manual approval rules
Which attribute do I need to change?	<code>Performance Goal.Goal Created Flag</code>

## Summary of the Tasks

You need to do these tasks to enable manual approval for addition of goals.

1. Configure rules for the **Approve Performance Goal** task.
2. Disable automatic approval of new goals.
3. Enable manual approval for goal addition.
4. Save and submit your changes.

## Configure Rules for the Approve Performance Goal Task

1. Navigate to **Tools > Transaction Console**.
2. Click the **Approval Rules** tab.
3. Search for and select the **Approve Performance Goal** task.
4. Click the **Configure Rules** icon.

## Disable Automatic Approval of New Goals

1. Select the **PerformanceGoalAutoApproval** node.
2. Click **Configure Rule Conditions**.
3. In the Condition Details window, select the **AND** node.
4. From the toolbar, click **Add Expression**.
5. In the Add Condition Expression dialog, from the **Select value type** list, select **Select from attribute**.
6. From the Select Attribute list, select the **Performance Goals** attribute and then select the **Goal Created Flag** attribute.
7. From the Select Operator list, select the **!=** operator.
8. From the last Select value type list, select **Enter a string**, and then enter the condition value as **"Y"**.
9. Click **OK**.
10. Click **OK**.

## Enable Manual Approval for Goal Addition

1. Select the **PerformanceGoalManualApproval** node.
2. Click **Configure Rule Conditions**.
3. In the Condition Details window, select the **OR** node.
4. From the toolbar, click **Add Expression**.
5. In the Add Condition Expression dialog, from the **Select value type** list, select **Select from attribute**.

6. From the Select Attribute list, select the **Performance Goals** attribute and then select the `Goal Created Flag` attribute.
7. From the Select Operator list, select the `==` operator.
8. From the last Select value type list, select **Enter a string**, and then enter the condition value as **"Y"**.
9. Click **OK**.
10. Click **OK**.

## Save and Submit Your Changes

1. Click **Save**.
2. Click **Submit**.

### Related Topics

- [HCM Approval Rules](#)

## Example of Adding a Manual Approval Condition for Performance Goals

This example shows how you can add a condition to the performance goal approval rule set to trigger manual approval.

Currently, whenever a target outcome is added to a performance goal, it's autoapproved. But your organization wants approvals to be triggered whenever any user adds a target outcome to a goal. This table summarizes the key decisions for this scenario.

Decisions to Consider	In This Example
Who will approve target outcome additions?	Managers that the employee reports to
Which approval rules do I need to modify?	Both autoapproval and manual approval rules
Which attribute needs to be changed?	<code>Performance Goal.Target Outcome Created Flag</code>

## Summary of the Tasks

You need to do these tasks to enable manual approval for addition of target outcomes to goals.

1. Use the **Approve Performance Goal** task.
2. Disable automatic approval for adding a target outcome to a goal.
3. Enable manual approval for adding a target outcome to a goal.
4. Save and submit your changes.

## Use the Approve Performance Goal Task

1. Navigate to **Tools > Transaction Console**.

2. Click the **Approval Rules** tab.
3. Search for and select the **Approve Performance Goal** task.
4. Click the **Configure Rules** icon.

## Disable Automatic Approval for Addition of Target Outcomes

1. Select the **PerformanceGoalAutoApproval** node.
2. Click **Configure Rule Conditions**.
3. In the Condition Details window, select the **AND** node.
4. From the toolbar, click **Add Expression**.
5. In the Add Condition Expression dialog, from the **Select value type** list, select **Select from attribute**.
6. From the Select Attribute list, select **Performance Goals** and then select **Target Outcome Created Flag**.
7. From the Select Operator list, select the **!=** operator.
8. From the last Select value type list, select **Enter a string** and then enter the condition value as **"Y"**.
9. Click **OK**.
10. Click **OK**.

## Enable Manual Approval for Addition of Target Outcomes

1. Select the **PerformanceGoalManualApproval** node.
2. Click **Configure Rule Conditions**.
3. In the Condition Details window, select the **OR** node.
4. From the toolbar, click **Add Expression**.
5. In the Add Condition Expression dialog, from the **Select value type** list, select **Select from attribute**.
6. From the Select Attribute list, select **Performance Goals** and then select **Target Outcome Created Flag**.
7. From the Select Operator list, select the **==** operator.
8. From the last Select value type list, select **Enter a string** and then enter the condition value as **"Y"**.
9. Click **OK**.
10. Click **OK**.

## Save and Submit Your Changes

1. Click **Save**.
2. Click **Submit**.

### Related Topics

- [HCM Approval Rules](#)

## FAQs

### Can I bypass the goal approval process for my organization?

Yes, you can if you're an administrator. You need to enable **Bypass Approvals** on the Approval Rules tab of the Transaction Console.

When you do so, goal changes are saved immediately in the database. No approval messages are shown and goal plans aren't locked.

## Can I delete a goal approval condition in transaction console?

Yes. You need to delete the condition in the Condition Details window of both the autoapproval and manual approval rules.

## What happens if I edit or delete an approval rule?

If you edit or delete an approval rule on the Manage Approval Rules page, then approvals currently in progress complete as if the rule had not been edited or deleted.

New approvals follow the latest version of the rule.

**Note:** For more information about approvals, see Frequently Asked Questions About Approvals (Doc ID 1987850.1) on My Oracle Support at <https://support.oracle.com>.





# 8 Contextual Notes

## 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.

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 an employee's development goal
- Notes for an employee in the context of an employee's career development
- Notes when you explore roles in the context of role details page

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

- [Implementing Contextual Notes in Oracle HCM Cloud Talent Management \(Doc ID 2375556.1\) on My Oracle Support](#)

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

As an application implementation consultant, you can embed a Contextual Notes component in an employee's goals page so that managers can add comments for the employee regarding the goal.

This table summarizes the key decisions for this scenario.

Decisions to Consider	Who Makes the Decision	In This Example
Which Notes component can I add to the performance goal page?	Application implementation consultant	Person Notes

Decisions to Consider	Who Makes the Decision	In This Example
Override the default visibility options of Person Notes?	Application implementation consultant	No
What visibility setting do I need to use for the Notes component?	Person creating the note, usually the manager	Everyone

This example explains how to add and use a Notes component in a performance goal page.

1. Add Notes component to an employee's performance goal page.
2. Configure contextual notes parameters.
3. Create a note in the goal page.

## Add Notes Component

The Contextual Notes container exists in the Talent Management application pages. You need to add the Notes component, define the context parameters, and specify the options to configure it in the application page.

1. Sign into the application as a user with configuration privileges.
2. Activate a sandbox that has Page Composer enabled.
3. Navigate to an employee's performance goal page.
4. On the Setting and Actions menu, select **Edit Pages**.
5. Ensure that the **Edit Layer** is **Site**.
6. Select the **Structure** tab.
7. Select the region where you want to add the note.
8. In the Source window, click the **Add** icon.
9. In the **Add Content** dialog box, click **Add** adjacent to the Notes component.
10. Close the Add Content dialog box.

You can see the Notes component added to the page.

## Configure Person Notes for an Employee's Performance Goal

1. In the Source window, select the Notes component and edit its properties.

You can see the Component Properties window.

2. In the Parameters tab, enter the expression values for the parameters shown in this table.

Parameter	Expression
Object Type	PER_PERSON
Object ID	<code># {pageFlowScope.pWorkerPersonId}</code>
Context Type	ORA_PERFORMANCE_GOAL

Parameter	Expression
	<p><b>Note:</b> You can use your own string for the <b>Context Type</b> value. But you can see notes created in check-in documents only if you use the <b>ORA_PERFORMANCE_GOAL</b> value.</p>
Context ID	<code># {pageFlowScope .baseGoalId}</code>
Show Detail Page	<code>' true '</code>

You can't change the title text of person notes.

3. You can define Display Options and Style attributes in the other tabs of the Component Properties window.
4. Click **Apply** and then **OK**.
5. Click **Close** to stop editing the page.

You can override the default visibility options of Person Notes using the Manage Common Lookups and Manage Feedback Visibility tasks in Functional Setup Manager. As we are going to use only the default values, we don't need to change or override the visibility settings.

## Create a Note in the Goal Page

After the implementation consultant adds the Notes component to the performance goal page, any employee with access to the page can see the Feedback section in the page. To create a note, do these steps:

1. In the Feedback section of the goal page, click **Add**.
2. From the **Who can see my feedback** list, select **Everyone**.
3. In the **What do you want to say?** area, type your feedback.
4. Click **Save**.

You can create multiple notes.

### Related Topics



# 9 Goal Management Diagnostic and Integrity Checks

## Data Diagnostic Test for Oracle Fusion Cloud Goal Management

After populating the Oracle Fusion Cloud 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.

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

### Run the Oracle 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.

## Goal Management Diagnostics

Run the **Goal Management Diagnostics Report** process to generate reports that will help you to identify and fix issues in your Oracle Fusion Cloud Goal Management implementation.

The report generated uses masking characters to secure data in various sections. Check the **Goal Management Diagnostics Report Hide Columns (ORA\_HRG\_DIAGREPORT\_HIDE\_COLUMN)** lookup to identify the secured columns. If you want to mask other columns, add the column name to this lookup.

## Parameters for the **Goal Management Diagnostics Report** Process

- **Person Number:** The person number of the worker for whom you're generating the diagnostic report.
- **Duration:** Specify the number of days before the current date you want to select active goal plans. The default value of this parameter is 720.

## Generated Report

Rename the extension of the output file of the report to .html to view the report. The report is divided into sections. Click the link to view the section content. Some sections related to performance goals are:

- **Performance Goal data for worker:** You can view performance goal information such as the details of the goals assigned to the worker, the goal plan assigned to the worker, the organization goals assigned to the worker, the goals shared with the worker, goal alignment details.
- **Goals Profile Options and other configurations:** You can view profile option settings, flexfields configured, notifications setup, and bypass approval settings.
- **Goal Management Diagnostic Lookup Values:** You can view the **ORA\_HRG\_DIAGREPORT\_HIDE\_COLUMN** lookup codes that have been used for the report. These are the secured columns of the report.

### Related Topics

- [Submit Scheduled Processes and Process Sets](#)

## Check Data Integrity of Performance Goals

Run the **Check Goal Data Integrity** process to fix issues such as duplicate goal plan assignments and locked Goals page when approvals are pending.

To run the **Check Goal Data Integrity** process, your role must be granted the **Run Goals Batch Process (HRG\_MANAGE\_SCHEDULING\_BATCH\_PROCESS\_PRIV)** privilege.

## Solutions of the **Check Goal Data Integrity** Process

This table lists the solutions of the **Check Goal Data Integrity** process.

### **Solutions for Goal Management Data Issues**

Issue	Solution
Duplicate goal plan assignments for a worker	Retain only the first goal plan assignment and delete all the other duplicate assignments.
Locked goal plan when approvals are pending for goals	Update goal version type code to <b>Active</b> .

## Parameters for the **Check Goal Data Integrity** Process

- **Action:** The action for the integrity check. You can preview the results or update the results. This is based on the **Goal Data Integrity Check Action (ORA\_HRG\_DATA\_INTEG\_CHEK\_ACTION)** lookup.
- **Review Period:** The review period in which to perform the integrity check.
- **Goal Plan:** The goal plan to check.
- **Person Number:** The person number of the worker whose goal plan you want to check.

**Note:** To run the **Check Goal Data Integrity** process for performance goals, you need to specify the review period and goal plan name.

## Process Results

After the **Check Goal Data Integrity** process completes, download the csv and log files to view the results of the integrity check.

### Related Topics

- [Submit Scheduled Processes and Process Sets](#)

## FAQ

### How can I change the default purge period for the integrity check data of goals?

The default purge period for the data generated by the **Check Goal Data Integrity** process is 365 days.

If you want to change this, you need to create the **HRG\_DATA\_INTEG\_CHK\_PURGE\_PRD** profile option with the values listed in this table.

Field	Value
Profile Display Name	A suitable name, such as Data Integrity Check Purge Period
Application	Goal Management
Module	Repository
Start Date	01/01/00

Then edit the **HRG\_DATA\_INTEG\_CHK\_PURGE\_PRD** profile option and set its value to the number of days you want to retain the integrity check data.

### Related Topics

- [Create and Edit Profile Options](#)





# 10 Personalization Using Transaction Design Studio

## Use Transaction Design Studio to Configure Field Displays

Use the Transaction Design Studio (TDS) to configure transactions and pages for responsive applications. TDS is available within the HCM Experience Design Studio.

You can control the visibility of attributes that are displayed either as **Delivered** or **Enabled**, and the availability of fields and sections of a transaction based on the user's role, person's business unit, or legal employer.

By default, the responsive pages display the often used attributes and hide the less often used attributes. Use Page Composer to personalize the responsive pages and display the attributes and tabs delivered within the feature.

Here's how you start HCM Experience Design Studio:

1. Sign in to the application as Human Capital Management Application Administrator with Access HCM Page Configurator (HRC\_ACCESS\_HCM\_TRANSACTION\_CONFIGURATOR\_PRIV) privilege. This privilege provides you access to TDS in HCM Experience Design Studio.
2. Enable a sandbox to compose data for configuring business objects. On the Home page, click the **HCM Experience Design Studio** quick action under the **My Client Groups** tab.
3. Under **Settings and Actions**, click **Edit Pages**.
4. Select the site layer and click **OK**.

### Related Topics

- [Overview of Page Modification](#)

## How You Configure Goal Management Pages Using Transaction Design Studio

Use Transaction Design Studio (TDS) to create rules for configuring Goal Management pages.

You can create rules to show or hide fields on Goal Management pages. You can also mark some fields as required to be filled. For example, you may not want employees to delete or cancel goals. You may want to allow only managers and HR specialists to do these actions. You can create a rule that hides these actions for employees.

**Note:** Transaction Design Studio configurations for Goal Management apply only when the **Drill Down to Goal Details** profile option is enabled. If this is disabled, you need to use Page Composer to show the hidden fields.

## Actions

This table shows the actions that you can use to configure Goal Management pages and the page for which the action applies.

Action	Page
Performance Goal Details	Goal page
Performance Goal Library	Library goal page of Performance Goal Library

**Tip:** Did you know that you can create multiple rules for an action?

## Performance Goal Details Action

Use the **Performance Goal Details** action in TDS to create rules to configure Goal pages. You can show or hide fields in the rule. You can also mark some fields as required to be filled.

You can specify the guided journey tasks to show at the page level and for different sections in the Show or Hide Regions section.

You can select different regions in the Page Attributes section. You can then set the visibility of the different attributes listed in this table.

Region	Attribute	Page and Field Name	Visible by Default?
Assign Goal	Goal Plan	Assign Goal page <b>Goal Plan</b> list of values	Yes
Assign Goal	Review Period	Assign Goal page Review Period	Yes
Assign Goal	Weight	Assign Goal page Weight	Yes
Goals Shared with Me	Category	Goals Shared with Me section on employee's Goals page Category	No
Goals Shared with Me	Level	Goals Shared with Me section on employee's Goals page Level	No
Goals Shared with Me	Related Link	Goals Shared with Me section on employee's Goals page	No

Region	Attribute	Page and Field Name	Visible by Default?
		Related Link	
Goals Shared with Me	Start Date	Goals Shared with Me section on employee's Goals page Start Date	No
Goals Shared with Me	Status	Goals Shared with Me section on employee's Goals page Status	No
Goals Shared with Me	Subtype	Goals Shared with Me section on employee's Goals page Subtype	No
Goals Shared with Me	Target Completion Date	Goals Shared with Me section on employee's Goals page Target Completion Date	Yes
Worker Goals in Goal Plan	Assign	<b>Assign</b> action for a goal	Yes
Worker Goals in Goal Plan	Cancel	<b>Cancel</b> action for a goal	Yes
Worker Goals in Goal Plan	Copy	<b>Copy</b> action for a goal	Yes
Worker Goals in Goal Plan	Delete	<b>Delete</b> action for a goal	Yes
Worker Goals in Goal Plan	Edit Display Sequence	Edit Display Sequence action for editing the display sequence of goals in a goal plan	No
Worker Goals in Goal Plan	Extend	<b>Extend</b> action for a goal	No
Worker Goals in Goal Plan	Feedback Requests	Feedback section of the goal and the Request Feedback action	No
Worker Goals in Goal Plan	Move	<b>Move</b> action for a goal	No
Worker Goals in Goal Plan	Print	<b>Print</b> action for a goal	No
Worker Goals in Goal Plan	Completion Percentage Sort Options	Sort menu options for sorting by goal completion percentage in ascending and descending order	No

Region	Attribute	Page and Field Name	Visible by Default?
Worker Goals in Goal Plan	Goal Category Sort Options	Sort menu options for sorting by goal category	No
Worker Goals in Goal Plan	Goal Name Sort Options	Sort menu options for sorting by goal name	Yes
Worker Goals in Goal Plan	Goal Priority Sort Options	Sort menu options for sorting by goal priority	No
Worker Goals in Goal Plan	Goal Status Sort Option	Sort menu option for sorting by goal status	No
Worker Goals in Goal Plan	Goal Weight Sort Options	Sort menu options for sorting by goal weight in ascending and descending order	No
Worker Goals in Goal Plan	Last Updated Sort Options	Sort menu options for sorting by last update date of the goal	Yes
Worker Goals in Goal Plan	Target Completion Date Sort Options	Sort menu options for sorting by target completion date of the goal	No
Worker Goals in Goal Plan	Notes	Notes section of a goal	No
Goals Spotlight	Business Title	Business title shown in the Performance Goals overview page or when you click <b>More Information</b> for a person on the Goals tab of the person spotlight page	Yes
Goals Spotlight	Comments and Attachments	Comments and Attachments section in goal approval requests	Yes
Goals Spotlight	Goal Plan	<b>Goal Plan</b> list of values on the Goals tab of the person spotlight page	Yes
Goals Spotlight	Goal Plan Set	<b>Goal Plan Set</b> list of values on the Goals tab of the person spotlight page	Yes
Goals Spotlight	Review Period	<b>Review Period</b> list of values on the Goals tab of the person spotlight page	Yes

Select the appropriate data source in the Available Attributes section and then configure the attributes. This table lists the attributes you can configure for the **Basic Information** data source.

Attribute	Field on Goal Page	Visible by Default?	Make Required/ Not Required
Actual Completion Date	Actual Completion Date	Yes	No
Aligned	Aligned label	No	No
Attachments	Attachments	No	No
Category	Category	Yes	Yes
Comments	Comments	No	Yes
Completion Percentage	Completion Percentage	No	Yes
Description	Description	Yes	Yes
Last Update	Name shown in <b>Last Update</b> field	Yes	No
Level	Level	No	Yes
Long Description	Long Description	No	Yes
Priority	Priority	No	Yes
Private	Private goal indicator	Yes	No
Related Link	Related Link	No	Yes
Shared	Shared label	No	No
Source	Source	Yes	No
Status	Status	Yes	No
Subtype	Subtype	No	Yes
Success Criteria	Success Criteria	Yes	Yes
Target Completion Date		Yes	Yes
Weight	Weight	Yes	Yes

To configure the attributes of the Measurements section of the Goal page, select the **Measurement** data source. Refer to this table to identify the attributes that you can configure for the Measurements section.

Attribute	Field in Measurements Section	Visible by Default?	Make Required/ Not Required
Achieved Weight	Achieved Weight	No	No
Actual Value	Actual Value	Yes	No
Comments	Comments	Yes	Yes
End Date	End Date	Yes	Yes
Maximum Target	Maximum label	No	No
Minimum Target	Minimum label	No	No
Start Date	Start Date	Yes	Yes
Target Percentage	Target Percentage	No	No
Target Type	Target Type list of values	Yes	No
Target Value	Target Value	Yes	No
Unit of Measure	Unit of Measure list of values	Yes	Yes

To configure the attributes of the Tasks section of the Goal page, select the **Tasks** data source. Refer to this table to identify the attributes that you can configure for the Tasks section.

Attribute	Field in Tasks Section	Visible by Default?	Make Required/ Not Required
Comments	Comments	Yes	Yes
Completion Percentage	Completion Percentage	Yes	Yes
Priority	Priority list of values	Yes	Yes
Related Link	Related Link	Yes	Yes
Start Date	Start Date	Yes	Yes
Status	Status list of values	Yes	Yes

Attribute	Field in Tasks Section	Visible by Default?	Make Required/ Not Required
Target Completion Date	Target Completion Date	Yes	Yes
Type	Type list of values	Yes	No

## Performance Goal Library

Use the **Performance Goal Library** action to create rules for configuring the performance library goal page.

Select the appropriate data source in the Available Attributes section and then configure the attributes. This table lists the attributes you can configure for the **Library and Basic Info** data source.

Attribute	Field on Performance Library Goal Page	Visible by Default?	Make Required/ Not Required
Available To	<b>Available To</b> list of values in Library Info section of Add Goal page	Yes	No
Business Unit	<b>Business Unit</b> list of values in Library Info section of Add Goal page	Yes	Yes
Category	<b>Category</b> list of values in Basic Info section of Add Goal page	Yes	Yes
Comments	<b>Comments</b> field in Basic Info section of Add Goal page	Yes	Yes
Department	<b>Department</b> list of values in Library Info section of Add Goal page	Yes	Yes
Description	<b>Description</b> field in Basic Info section of Add Goal page	Yes	Yes
External ID	<b>External ID</b> field in Library Info section of Add Goal page	Yes	No
Job Family	<b>Job Family</b> list of values in Library Info section of Add Goal page	Yes	Yes
Legal Employer	<b>Legal Employer</b> list of values in Library Info section of Add Goal page	Yes	Yes

Attribute	Field on Performance Library Goal Page	Visible by Default?	Make Required/ Not Required
Level	<b>Level</b> list of values in Basic Info section of Add Goal page	Yes	Yes
Long Description	<b>Long Description</b> field in Basic Info section of Add Goal page	No	Yes
Priority	<b>Priority</b> list of values in Basic Info section of Add Goal page	Yes	Yes
Related Link	<b>Related Link</b> field in Basic Info section of Add Goal page	Yes	Yes
Start Date	<b>Start Date</b> field in Basic Info section of Add Goal page	Yes	Yes
Status	<b>Status</b> list of values in Library Info section of Add Goal page	Yes	No
Subtype	<b>Subtype</b> list of values in Basic Info section of Add Goal page	Yes	Yes
Success Criteria	<b>Success Criteria</b> label in Basic Info section of Add Goal page	Yes	Yes
Success Criteria Text	<b>Success Criteria</b> text field in Basic Info section of Add Goal page	Yes	No
Target Completion Date	<b>Target Completion Date</b> field in Basic Info section of Add Goal page	Yes	Yes
Type	<b>Type</b> field in Library Info section of Add Goal page	Yes	No
Weight	<b>Weight</b> field in Basic Info section of Add Goal page	Yes	Yes

To configure the attributes of the Measurements section of the performance library goal page, select the **Measurement** data source. Refer to this table to identify the attributes that you can configure for the Measurements section.

Attribute	Field in Measurements Section	Visible by Default?	Make Required/ Not Required
Achieved Weight	Achieved Weight	No	No
Actual Value	Actual Value	Yes	No



Attribute	Field in Measurements Section	Visible by Default?	Make Required/ Not Required
Comments	Comments	Yes	Yes
End Date	End Date	Yes	Yes
Maximum Target	Maximum label	No	No
Minimum Target	Minimum label	No	No
Start Date	Start Date	Yes	Yes
Target Percentage	Target Percentage	No	No
Target Value	Target Value	Yes	No
Target Type	Target Type	Yes	No
Unit of Measure	Unit of Measure	Yes	Yes

To configure the attributes of the Tasks section of the performance library goal page, select the **Tasks** data source. Refer to this table to identify the attributes that you can configure for the Tasks section.

Attribute	Field in Tasks Section	Visible by Default?	Make Required/ Not Required
Comments	Comments	Yes	Yes
Completion Percentage	Completion Percentage	Yes	Yes
Priority	Priority	Yes	Yes
Related Link	Related Link	Yes	Yes
Start Date	Start Date	Yes	Yes
Status	Status	Yes	Yes
Target Completion Date	Target Completion Date	Yes	Yes

*Related Topics*

- [HCM Experience Design Studio](#)

# Configure Guided Journeys for Goal Management Pages

Support employees and managers when they create and manage performance goals by providing guidance such as recorded tutorials and best practices.

## Before you start

First, you need to configure guided journey tasks for Oracle Fusion Cloud Goal Management flows. Use the **Guided Journey** category in **Checklist Templates** to set up and add tasks that are relevant for the guided journeys for Oracle Goal Management.

As administrators, you need to enable guided journeys on Oracle Goal Management pages using Transaction Design Studio (TDS). You can enable the guided journeys at both the page and page section level.

## Here's what to do

1. Select the **Performance Goal Details** action in TDS and add a rule.
2. In the Show or Hide Regions section, configure the guided journeys for page and page section level. Edit the region. Search and select the associated guided journey and the tasks to show for the region.
3. Save your changes.

## Results:

Users can see a **Guide Me** button after you enable a guided journey for the page section or page.

## Related Topics

- [Use Transaction Design Studio to Configure Field Displays](#)
- [Overview of Guided Journeys](#)

# FAQs for Personalization Using Transaction Design Studio

## How can I show more details for shared goals?

As an administrator, use Transaction Design Studio to show more details for shared goals listed in the Goals Shared with Me section.

1. Enable a sandbox and then edit your pages at the Site level.
2. Open HCM Experience Design Studio.
3. Select the **Transaction Design Studio** tab.
4. From the **Action** list, select **Performance Goal Details**.
5. Add a rule.
6. Enter the basic details.

7. From the **Region** list of the Page Attributes section, select the **Goals Shared with Me** region.
8. Set any of these attributes to **Visible**:
  - o Category
  - o Level
  - o Related Link
  - o Start Date
  - o Status
  - o Subtype
9. Click **Save and Close**.

## How can I show labels for shared and aligned goals?

As an administrator use Transaction Design Studio to show labels for shared and aligned goals.

1. Enable a sandbox and then edit your pages at the Site level.
2. Open HCM Experience Design Studio.
3. Select the **Transaction Design Studio** tab.
4. From the **Action** list, select **Performance Goal Details**.
5. Add a rule.
6. Enter the basic details.
7. From the **Data Source** list of the Available Attributes section, select **Basic Information**.
8. Set these attributes to **Visible**:
  - o **Aligned**: To show the **Aligned** label for aligned goals
  - o **Shared**: To show the **Shared** label for shared goals
9. Click **Save and Close**.

## How can I show or hide the sort options of a goal plan?

To configure the sort options for goals in a goal plan, use Transaction Design Studio as an administrator.

1. Enable a sandbox and then edit your pages at the Site level.
2. Open HCM Experience Design Studio.
3. Select the Transaction Design Studio tab.
4. From the **Action** list, select **Performance Goal Details**.
5. Add a rule.
6. Enter the basic details.
7. From the **Region** list of the Page Attributes section, select **Worker Goals in Goal Plan**.
8. To show the sort options, set any of these attributes to **Visible**. To hide the sort options, set the attributes to **Not visible**.
  - o Completion Percentage Sort Options
  - o Goal Category Sort Options

- Goal Name Sort Options
- Goal Priority Sort Options
- Goal Status Sort Option
- Goal Weight Sort Options
- Last Updated Sort Options
- Target Completion Date Sort Options

9. Click **Save and Close**.

#### Related Topics

- [HCM Experience Design Studio](#)

## How can I allow users to edit the display sequence of goals?

To allow users to edit the display sequence of goals, use Transaction Design Studio as an administrator.

1. Enable a sandbox and then edit your pages at the Site level.
2. Open HCM Experience Design Studio.
3. Select the Transaction Design Studio tab.
4. From the **Action** list, select **Performance Goal Details**.
5. Add a rule.
6. Enter the basic details.
7. From the **Region** list of the Page Attributes section, select **Worker Goals in Goal Plan**.
8. To allow editing the display sequence of goals in the goal plan, set the **Edit Display Sequence** attribute to **Visible**. To disable editing the display sequence, set the attribute to **Not visible**.
9. Click **Save and Close**.

#### Related Topics

- [HCM Experience Design Studio](#)

## How can I allow users to request feedback for performance goals?

To allow users to request feedback for performance goals, as administrators you need to use Transaction Design Studio.

1. Enable a sandbox and then edit your pages at the Site level.
2. Open HCM Experience Design Studio.
3. Select the Transaction Design Studio tab.
4. From the **Action** list, select **Performance Goal Details**.
5. Add a rule.
6. Enter the basic details.
7. From the **Region** list of the Page Attributes section, select **Worker Goals in Goal Plan**.
8. Set the **Feedback Requests** attribute to **Visible**.

9. Click **Save and Close**.

*Related Topics*

- [HCM Experience Design Studio](#)



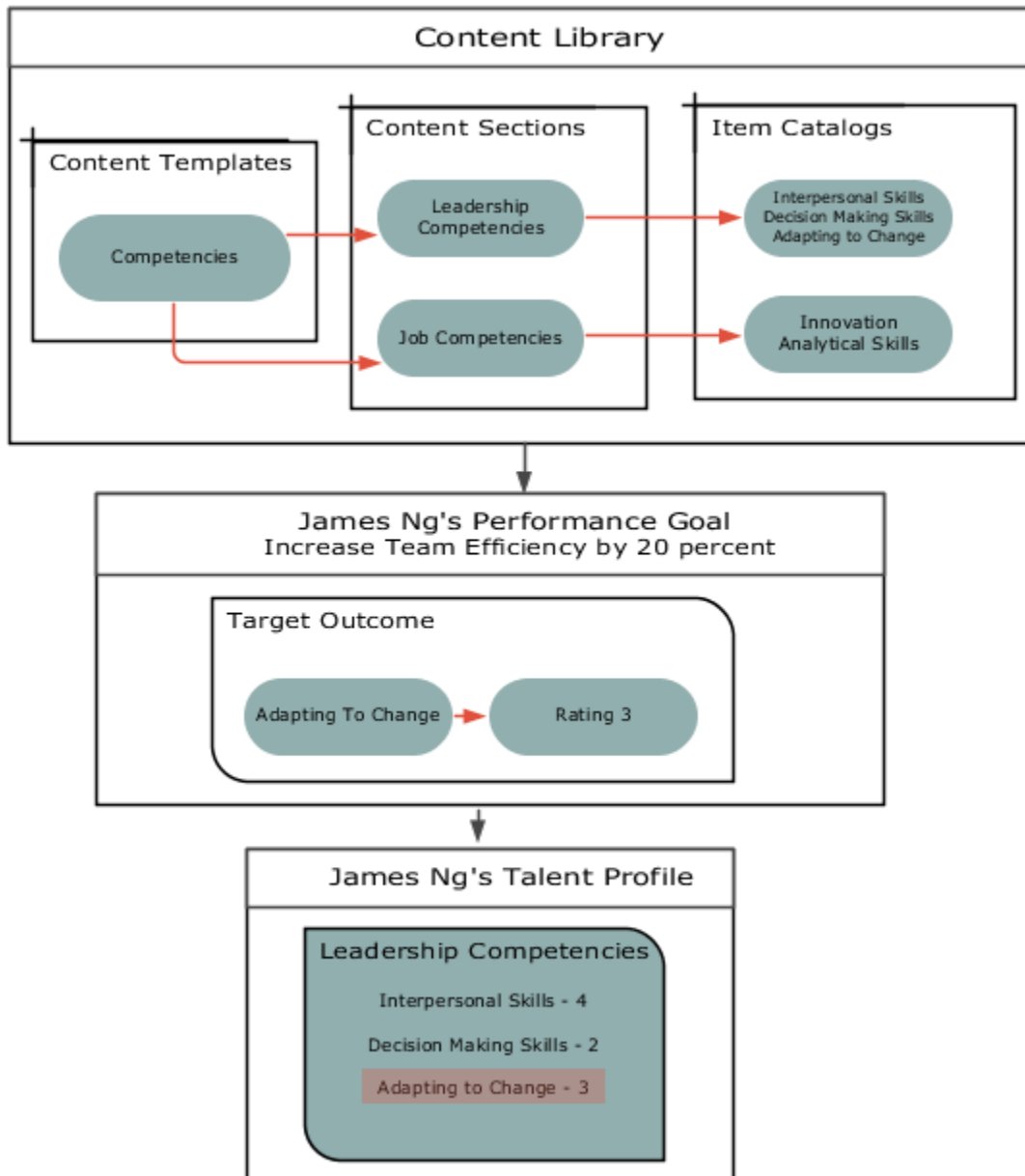
# 11 Integrations

## How Goal Management Works with Profiles

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

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

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



## What You Need to Do to Add Target Outcomes

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

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



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

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

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

Remember that you can't use these content templates:

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

## When You Can Add Target Outcomes to Performance Goals

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

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

## How Employee Profiles Are Updated

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

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

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

#### *Related Topics*

- [Goal Management Profile Options](#)
- [Content Sections](#)
- [Content Section Properties](#)

## How Performance Documents Work with Performance Goals

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

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

### Review Periods

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

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

### Performance Goals Section

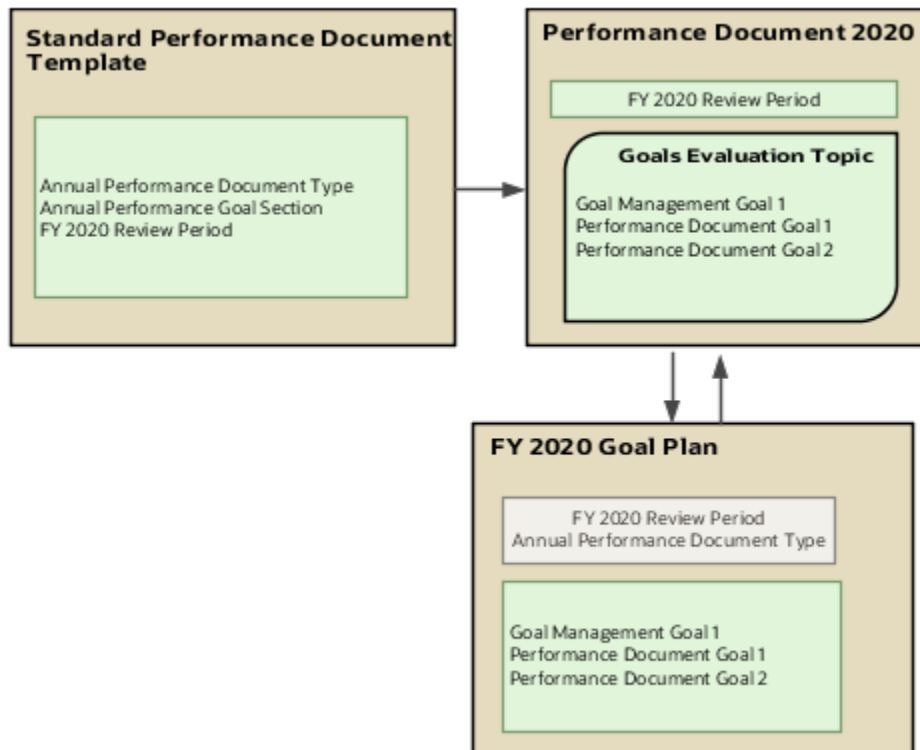
Use the Performance Goals section type in the performance template to create a section for performance goals. For the Performance Goals section, you can use rating models to rate employees and use calculation rules to calculate an overall goal section rating. Remember to enable ratings and comments so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

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

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

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

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



## Add Performance Goals to Performance Document

Add performance goals to performance documents in these ways:

- Employees and managers can add individual performance goals or library goals directly to a performance document if the goal plan to which they add the goal allows employees or managers to add goals. Remember that only goal plans that match the performance document configuration will be available for adding the goal.
- Note:** If approvals are enabled, performance goals are included after the approval process is complete.
- Employees and managers can import performance goals from other performance documents of the employee. Note that the ratings and evaluation comments aren't copied when you import goals.
  - As you already know, you can associate goal plans in Goal Management with performance document types. When you create any performance document based on an associated document type, the application adds the goals in the goal plan to that performance document.

## Update Performance Goals in Performance Documents

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

- When the manager or employee opens the performance document, all edits to performance goals except weights appear in the performance document.
- Only when the manager or employee uses the **Update Goals** action in the performance document, goal edits including weights appear in the document.

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

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

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

## Performance Goals in Completed Performance Document

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

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

## Remove Performance Goals from Performance Documents

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

### *Related Topics*

- [Review Periods in Talent Management](#)
- [Create a Performance Template](#)
- [Create a Performance Template Section for Performance Goals](#)
- [Overview of Performance Document Types](#)