

Oracle Fusion Cloud Talent Management

**Configure and assign goal plans in
Redwood**

FA Latest



Oracle Fusion Cloud Talent Management
Configure and assign goal plans in Redwood

FA Latest

G58253-01

Copyright © 2026, Oracle and/or its affiliates.

Author: Malini Sampathkumar

Contents

Get Help	i
1 Configure and assign goal plans in Redwood	1
Overview of goal plans	1
Overview of primary goal plan	1
Create a goal plan	2
Create a primary goal plan	4
Assign a goal plan	5
Delete goal plan assignees	6
FAQs for configuring goal plans	7

Get Help

In addition to the resources available in Oracle Help Center, you can explore training, connect with the Oracle community, and share your feedback.

Get Training

Increase your knowledge of Oracle Cloud by taking courses at [Oracle University](#).

Join Our Community

Use [Cloud Customer Connect](#) to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest [ideas](#) for product enhancements, and watch events.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to oracle_fusion_applications_help_ww_grp@oracle.com.

Thanks for helping us improve our user assistance!

1 Configure and assign goal plans in Redwood

Overview of goal plans

Goal plans are a collection of performance goals grouped by common characteristics. For example, a specified time period such as **FY2026** or a particular department that must work on them such as **Sales Goal Plan**. You need to have the privileges of the delivered HR Specialist role to create goal plans.

Use the **Goal Plans** link on the administrator Goals page to view the **Goal Plans** overview page.

By default, you can see the goal plans for the review period with the latest start date on the **Goal Plans** overview page. You can do these actions on this page:

- Create a goal plan.
- Edit a goal plan.
- Delete a goal plan that isn't assigned.
- Change the status of an existing goal plan to inactive.

Note: Managers and workers can't view or select inactive goal plans. But, HR specialists can view these goal plans on the Goal Plans overview page

- Manage goal plan assignees.

Overview of primary goal plan

A primary goal plan is a common goal plan that's available to all users for all review periods. You can have only one active primary goal plan for an organization.

A primary goal plan has these features:

- A primary goal plan is available to all users and can be updated by them.
- Weights are enabled by default for a primary goal plan.
- By default, the enforce sum of goal weights to 100% is disabled. But you can enable this.
- You can select the primary goal plan when adding or mass assigning performance goals. But you can't add goals to a primary goal plan when you create or edit it.

Primary goal plan and goal integrations

Other offerings can use primary goal plan in these ways:

- When a primary goal plan is active, performance goals added in a Talent Review meeting are automatically added to the primary goal plan of the selected review period.
- These rules apply for goals included in Redwood performance documents:
 - If the primary goal plan is associated with the document type used for a performance document template, then when the administrator creates a performance document based on that template, a

primary goal plan is created for that review period. A primary goal plan need not be associated with the review period of the performance document.

- Goals in the performance template of the performance document are added to the primary goal plan.
- If the primary goal plan is associated with the document type used for the performance template, then when you copy goals from a performance document, they're added to the primary goal plan.

Create a goal plan

You create goal plans on the **Goal Plans** page.

Go to **My Client Groups > Goals > Goal Plans** to view the **Goal Plans** page. Then select **Add**.

Update your person information before you try to create goal plans. Person information determines goal plan security and is used to update attributes such as the person who assigned the goal plan.

Note: The instructions in this topic apply only for regular goal plans and not for primary goal plans.

On the **New Goal Plan** page, do these tasks:

1. Specify goal plan details.
2. Add goals.
3. Include eligibility profiles. (Optional)
4. Select employees to assign the goals in the goal plan. (Optional)
5. Select employees to exclude from the goal assignment. (Optional)
6. Select **Create**.

Specify goal plan details

- Enter a name that uniquely identifies the goal plan for that review period.
- Select the review period with which the goal plan is associated.
- Select the goal plan status.
- Enter a suitable description.
- Select the goal plan start and end dates. These dates need to lie within the review period dates.
- Indicate who can update the goals in the goal plan.
- If your administrator has enabled the goal setting dates and controls, specify the goal setting period. You can restrict workers from adding goals after the end of the goal setting period. You can also restrict them from editing, canceling, or deleting goals after this end date.
- Select the evaluation type. This attribute is used to sync performance goals in Redwood Goal Management with specific sections of the performance template. When users create a performance document, goal plans that have the same evaluation type as performance goal sections defined in the performance template are automatically added as evaluation topics.
- Indicate if managers and employees can cancel or delete goals that have been assigned by HR specialists.
- Indicate if you want to enable weights for the goals in the goal plan. Goal weights indicate the relative importance of each goal in the goal plan. You can also enforce that the sum of goal weights in the goal plan is 100%.

- Optionally, specify the minimum and maximum goals that the goal plan can have. You can enforce that the count of goals doesn't exceed the specified maximum.
- Select the performance document types that can be associated with the goal plan. When performance documents are created based on the associated document type, the goals in the goal plan are added to that performance document if it has the same review period. For more information see *Which performance document types can I associate with a goal plan?*.

Add goals to the goal plan

You add goals in the **Goals** section of the goal plan.

1. Select the **Add Goals** icon.
2. On the **New goal** panel, specify these goal details:
 - Name
 - | **Note:** If your administrator has enabled the library goals list of values, you can select a library goal.
 - Success criteria
 - Comments
 - Start date and target completion dates
 - | **Note:** These dates must lie within the goal plan dates.
 - Priority
 - Category
 - Indicate who can delete the goal
 - If your administrator has enabled allowing assignees to edit the goal definition details, you can select this option if needed.
 - If your administrator has enabled adding measurements, indicate if it's a measurable goal and specify values in the measurement fields.
 - If your administrator has enabled adding tasks, you can add tasks for the goal. If measurements are enabled for tasks, specify the task measurements.
 - If your administrator has enabled adding target outcomes, you can add them.
 - Select **Add**.

| **Tip:** You can also import goals from another goal plan. Use the **Import Goals** action.

Include eligibility profiles

You can add eligibility profiles to goal plans to assign goals included in the plan to individuals who meet the criteria of all profiles that you indicate are required profiles. You can restrict goals to workers who meet eligibility requirements by job, job role, location, age, or other criteria. For example, you can add a location eligibility profile to a goal plan if you want to restrict goals to individuals who are located in a certain place.

Add assignees

Select the employees for assigning goals in the goal plan. After selecting the employee, you can assign the goals to any of these people:

- Only the selected employee
- Only people who directly report to the selected employee
- All people who report to the selected employee
- Only the selected employee and the people who directly report to the selected employee
- The selected employee and all the people who report to the selected employee

Select employees to exclude from the goal assignment

You can select the employees who you don't want to assign the goals in the goal plan.

Create a primary goal plan

You create a primary goal plan on the **Goal Plans** page.

1. Go to **My Client Groups > Goals > Goal Plans** to view the **Goal Plans** page.
2. Select **Primary Plan**.
3. On the **New Primary Plan** page, specify these details:
 - Primary goal plan name
 - Status
 - Description
4. Indicate who can add and edit goals in the primary goal plan.
5. Indicate if managers and employees can cancel or delete goals that have been assigned by HR specialists.
6. Select the evaluation type. This attribute is used to sync performance goals in Redwood Goal Management with specific sections of the performance template. When users create a performance document, the primary goal plan that has the same evaluation type as performance goal sections defined in the performance template is automatically added as an evaluation topic.
7. Indicate if you want to enable weights for the goals in the primary goal plan. Goal weights indicate the relative importance of each goal in the primary goal plan. You can also enforce that the sum of goal weights in the primary goal plan is 100%.
8. Optionally, specify the maximum goals that the primary goal plan can have. You can enforce that the count of goals doesn't exceed the specified maximum.
9. Select the performance document types to associate with the primary goal plan. For more information see *Which performance document types can I associate with a goal plan?*.
10. Select **Create**.

Assign a goal plan

The goals added to a goal plan aren't automatically assigned. You need to run a scheduled process to assign the goals in the goal plan.

1. Go to **My Client Groups > Goals > Scheduled Processes for Performance Goals** to view the **Scheduled Processes for Performance Goals** page.
2. Select the **Assign goal plans** process type.
3. Select the goal plan name as the process name.
4. Select the effective date for the goal assignment.
5. Submit the process.
6. Review the scheduled processes.

Effect of enabling multithreaded batch processing

If the profile options for multithreaded batch processing of goal plans have been set up, multiple child processes are created to assign loose goal plans. The parent process remains in the paused state until the child processes complete. The number of child processes (or threads) created and the assignees in each process depends on the values that are specified for these profile options:

- HRG_GP_MAX_THREADS
- HRG_GP_MINCOUNT_EACHTHREAD
- HRG_GP_MINCOUNT_LASTTHREAD

This table indicates the default value of these profile options and what you need to remember when you specify a value for these profile options.

Profile Option	Description	Default Value	Points to Remember
HRG_GP_MAX_THREADS	Specifies the maximum number of threads for each batch process that assigns goals of a goal plan.	4	• If the value of this profile option is set to 0 or 1, only a single-threaded process is created. • This profile option value can't exceed 8. If it exceeds 8, the profile option value is reset to the default value 4.
HRG_GP_MINCOUNT_EACHTHREAD	Specifies the minimum number of assignments required for each thread of the multithreaded batch process.	5000	We recommend not to change the default value.
HRG_GP_MINCOUNT_LASTTHREAD	Specifies the minimum number of assignments required for the last thread of the multithreaded batch process.	1000	We recommend not to change the default value.

The value set for the HRG_GP_MAX_THREADS profile option only specifies the maximum number of threads. The actual number of threads to create is dynamically determined based on the values set for HRG_GP_MINCOUNT_EACHTHREAD and HRG_GP_MINCOUNT_LASTTHREAD profile options.

The assignments in each thread other than the last thread = Total number of goal plan assignees/Total number of threads

For example, let's assume that these values are assigned to the three profile options.

- **HRG_GP_MAX_THREADS:** 5
- **HRG_GP_MINCOUNT_EACHTHREAD:** 5000
- **HRG_GP_MINCOUNT_LASTTHREAD:** 1000

Let's also assume that the number of people to whom the goal plans must be assigned is 20500. In this case, 4 child processes are created. The assignments done in each child process other than the last one is 5000. The last child process assigns goals in the goal plan for the remaining 5500 people.

After the scheduled process for goal assignment completes

Here's what happens when you run the process for a new goal plan, rerun the scheduled process for an existing goal plan, or edit a goal plan and then rerun the process:

- Any new workers selected in the goal plan are assigned the included goals.
- Any new goals included in the goal plan are assigned to the selected workers.
- Any goals included in the goal plan, but already assigned to the selected workers remain assigned. There are no changes to such goals for the selected workers.
- Any goals included in the goal plan assigned earlier to any workers excluded later from the goal plan remain assigned to them. There are no changes to such goals or goal plans for the excluded workers. You must manually remove the goal from the goal plan for any workers included in any earlier submissions.

Delete goal plan assignees

You delete goal plan assignees on the **Assignees** page.

1. Go to **My Client Groups > Goals > Goal Plans** to view the **Goal Plans** page.
2. Select the **Manage Assignees** icon to view the **Assignees** page.
3. Apply filters or search assignees by their name.
4. Select the assignees who you want to delete.
5. Select **Delete**.

FAQs for configuring goal plans

How can I delete a goal plan?

You can delete a goal plan that isn't assigned to any workers. You can't delete an assigned goal plan. You can only change the status of an assigned goal plan to either active or inactive.

Inactive goal plans aren't available for use and aren't listed.

Why can't I update my goal plan?

You can't update goal plans that are pending approval. If approval is required, any goal or goal plan changes you make aren't final until approval is granted for the associated goal plan.

Can I change the review period associated with a goal plan?

You can change the review period associated with a goal plan only if the goal plan hasn't been assigned to any employee.

To change the review period associated with a goal plan that has already been assigned, you need to first delete all assignees of the goal plan. For more information on how to do this see, [Delete goal plan assignees](#).

Which performance document types can I associate with a goal plan?

For associating performance documents with goal plans, some conditions need to be met.

- The **From Date** of the performance document type needs to be the same as or before the start date of the goal plan. For example, if the start date of the goal plan is June 1, 2026, then the **From Date** of the performance document type must be June 1, 2026 or earlier.
- The **To Date** of the performance document type needs to be the same as or later than the end date of the goal plan. For example, if the end date of the goal plan is December 30, 2026, then the **To Date** of the performance document type must be December 30, 2026 or later.
- The status of the performance document type needs to be **Active**.

