Oracle Fusion Cloud Talent Management

How to implement Redwood Goals Center

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1 Overview of Implementing Redwood Goals Center

Overview of Implementing Redwood Goals Center

Use this playbook to get started with your implementation of the Redwood Goals Center. To implement Redwood Goals Center, you need to have the privileges of an application implementation consultant.

Complete these tasks to implement Redwood Goals Center.

- Enable Redwood Goals Center. For more information on this, see *Set profile options for Redwood pages*.
- *Configure relevant profile options*.
- *Configure relevant lookups*.
- *Define descriptive flexfields*.
- *Create review periods*.
- *Configure Alerts Composer templates for performance and development goals.*
- Configure these approval rules in Transaction Console:
  - *Performance goal approval rules*
  - *Development goal approval rules*
- *Extend Goals Center pages using Visual Builder Studio.*
- *Secure goal actions using privileges*.

You can also use the **Define Worker Goal Setting** task in the Setup and Maintenance work area to define goal objects.

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2 Profile Options to Configure

Profile Options for Redwood Goals Center

Use profile options to control the features that are available in Redwood Goals Center. To configure the profile options, navigate to the Setup and Maintenance work area and use the **Manage Administrator Profile Values** task.

Profile Options for Performance Goal Features

Profile Option Code	Profile Option Display Name	Default	Effect of Enabling	Effect of Disabling
HRG_ALLOW_DECIMALS_IN_WEIGHTS	Decimals in Goal Weights Allowed	Yes	Users can enter decimal values when entering weights for performance goals. For example, user can set the weight of a goal to **22.5**.	Users can't enter decimal values when entering weights for performance goals.
ORA_HRG_DEFAULT_GOAL_SORT_OPTION	Default Sort Option for Performance Goals	Display sequence	Goals are listed in the in the goal plan according to the sort order specified. **Note:** The sort order specified also applies to performance documents in which the goal plan is included that have synchronization of goals enabled.	You can select one of these sort options: • Display sequence • Goal name • Goal category • Goal status • Goal weight • Last updated date
HRG_COMPLETED_GOAL_EDIT_OPTIONS	Completed Goal Edit Options	Always open	Users can edit completed performance goals.	Users can't edit completed performance goals.
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_GOALS_SEARCH_BY_PERSON	Search for Performance Goals by Person ID	N	Can search performance goals only by person ID without considering the assignments.	Searches performance goals that are relevant to the selected assignment of the person.
ORA_HRG_REQUEST_FEEDBACK_ENABLED	Request Feedback for Goals Enabled	Yes	Can request feedback for goals.	Can't request feedback for goals.

Profile Option Code	Profile Option Display Name	Default	Effect of Enabling	Effect of Disabling
ORA_HRG_PERF_GOAL_LVL_APPROVL	Goal Level Approval Enabled	No	Users can make incremental changes to a performance goal plan that's in pending approval status.	The goal plan will be locked until the pending approvals are complete.

Profile Options for Goal Assignment

Profile Option Code	Profile Option Display Name	Default	Effect
HRG_ONLINE_PROCESS_THRESHOLD	Online Processing Threshold	25	Specifies the maximum number of goal records that can be automatically processed. The number of goal records to process is calculated using this formula: Number of goals x Number of assignees. This value applies for these use cases: • The HR specialist mass assigns goals or creates goal plans. • Managers add or assign goals. • Organization owners assign goals. **Note:** If the number of records exceeds the threshold, the process is submitted to the scheduled process queue.
HRG_GP_MAX_THREADS	Maximum Number of Threads for a Multithreaded Goals Batch Process	4	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.
HRG_GP_MINCOUNT_EACHTHREAD	Minimum Number of Assignments for Each Thread in a Multithreaded Goals Batch Process	5000	Specifies the minimum number of assignments required for each thread of a multithreaded batch process that assigns goals or goal plans.
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

Profile Option Code	Profile Option Display Name	Default	Effect
			process that assigns goals or goal plans.
HRG_MASS_REQ_OPTIMIZATION_LEVEL	Performance Optimization Level for Goals Assignment Through a Batch Process	1	Specifies the performance optimization level for mass assignment of goals through a batch process. Set this value to a number between 0 and 3. Here's what you indicate when you set this profile option to any of these values: • **0**: Show log messages and populate all results data from the process in temporary tables. • **1**: Show log messages and populate mid-level results data from the process in temporary tables. • **2**: Suppress log messages and populate high level results data from the process in temporary tables. • **3**: Suppress log messages and don't populate any results data from the process in temporary tables.

Profile Options for Development Goal Features

Profile Option Code	Profile Option Display Name	Default	Effect of Enabling	Effect of Disabling
ORA_HRD_COMPLETED_GOAL_EDIT_OPTIONS	Completed Development Goal Edit Options	Yes	Users can edit completed development goals.	Users can't edit completed development goals.
ORA_HRD_DELETE_HR_ASSIGNED_GOALS	Deleting Development Goals Assigned by HR Enabled	No	Managers and employees can delete development goals assigned by HR specialists.	Managers and employees can't delete development goals assigned by HR specialists.
ORA_HRD_INACTIVATE_HR_ASSIGNED_GOALS	Inactivate Development Goals Assigned by HR Enabled	No	Managers and employees can inactivate development goals assigned by HR specialists.	Managers and employees can't inactivate development goals assigned by HR specialists.

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Profile Options for Performance and Development Goal Notifications

Profile Option Code	Profile Option Display Name	Default	Effect of Enabling	Effect of Disabling
BIP_EMAIL_ NOTIFICATION_HCM	BI Publisher Notifications Enabled for Human Capital Management	true	Enables Oracle Business Intelligence Publisher email notifications for Human Capital Management applications.	No Business Intelligence Publisher email notifications are sent for Human Capital Management applications.
BIP_EMAIL_ NOTIFICATION_HCM_ TALENT	BI Publisher Notifications Enabled for Talent Management	false	Enables Oracle Business Intelligence Publisher email notifications for Talent Management applications.	No Business Intelligence Publisher email notifications are sent for Talent Management applications.
BIP_ONLINE_ NOTIFICATION_HCM	BI Publisher Worklist Notifications Enabled for Human Capital Management	true	Enables Oracle Business Intelligence Publisher worklist notifications for Human Capital Management applications.	No Business Intelligence Publisher worklist notifications are sent for Human Capital Management applications.
BIP_ONLINE_ NOTIFICATION_HCM_ TALENT **Note:** This profile option isn't delivered. You need to create this and set it to **True**.	BI Publisher Worklist Notifications Enabled for Talent Management	true	Enables Oracle Business Intelligence Publisher worklist notifications for Talent Management applications.	No Business Intelligence Publisher worklist notifications are sent for Talent Management applications.
BIP_ONLINE_ NOTIFICATION_HCM_ GOALS **Note:** This profile option isn't delivered. You need to create this and set it to **True**.	BI Publisher Worklist Notifications Enabled for Goals and Career Management	true	Users will receive goal and career development notifications.	Users won't receive goal and career development notifications.

Set Profile Option Values

Profile option values controls the enabling of a feature or its behavior.

1. In the Setup and Maintenance work area, use the **Manage Administrator Profile Values** task.
2. Search for and select the profile option.
3. Specify the level at which the profile value is to be set. If the profile value applies to the entire site, select **Site**. Otherwise, select **User**.

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4. If you had selected **User** as the profile level, select the user name.

5. In the Profile Values section, select or enter a value in the **Profile Value** column.

6. Click **Save and Close**.

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3 Lookups for Redwood Goals Center

Lookups for Redwood Goals Center

Use lookups that have an extensible or user configuration level to configure the features of Redwood Goals Center to suit your organization's requirements.

Tasks for Managing Goal Lookups

You can use these tasks in the Setup and Maintenance work area to manage lookups for Redwood Goals Center:

- Worker Goal Setting Lookups

- Manage Common Lookups

  > **Tip:** Enter **HRG** in the **Lookup Type** field to find lookups for Redwood Goals Center.

Privileges for Managing Goal Lookups

Ensure that the users who need to manage goal lookups have these privileges assigned:

- **Worker Goal Setting Lookups** task: Manage Application Set-Enabled Lookup (FND_APP_MANAGE_SET_ENABLED_LOOKUP_PRIV, Manage Application Standard Lookup (FND_APP_MANAGE_STANDARD_LOOKUP_PRIV)

- **Manage Common Lookups** task: Manage Application Common Lookup (FND_APP_MANAGE_COMMON_LOOKUP_PRIV)

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4 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
- Considerations for Managing Descriptive Flexfields

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5 Create Review Periods

Create Review Periods

Review periods are business periods that are defined by your organization for measuring performance. For example, you can create a review period for the Financial Year 2025 as FY2025.

Review periods are used to link Talent Management objects. For example, you can link goal plans and performance documents that have the same review period.

Use the **Review Periods** task in the Setup and Maintenance area to create and manage review periods. Here's how you create review periods:

1. In the Search Results section of the Review Periods page, click **Create Review Period**.
2. On the Create Review Period page, specify these details:

Field	Description
Review Period Name	A unique name for the review period.
Description	A suitable description for the review period.
Status	Select **Active** if you want the review period to be used.
Period Start Date	The start date of the review period.
Period End Date	The end date of the review period.

3. Click **Save and Close**.

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6 Configure Alerts

Alerts Composer Templates for Performance and Development Goals

Use the Alerts Composer tool to configure Redwood notifications for performance and development goals.

Search for the **Performance Goals Alerts** event to configure notifications for performance goals. Search for the **Development Goals Alerts** event to configure notifications for development goals. Enable the templates that your organization needs.

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7 Configure Approvals

Configure Approvals for Performance Goals

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 met, 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 met, approval notifications are generated.

The **Approve Performance Goal** task also has an autoapproval business rule for performance goals with blank transactions. 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 **NOT_** prefix to the attribute value in the expression. To ensure that the conditions evaluate to the true state, you need to remove the **NOT_** prefix 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.

Performance Goal Payload Attributes

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

Payload Attributes for Goals

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
`Success Criteria Updated Flag`	`Performance Goals.Success Criteria Updated Flag`	Y	Indicates that the success criteria of the performance goal is updated

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Approval Condition	Condition Attribute	Attribute Value to Enable Manual Approval	Description
• **Measurement Created Flag** • **Measurement Updated Flag** • **Measurement Deleted Flag**	• **Performance Goals.Measurement Created Flag** • **Performance Goals.Measurement Updated Flag** • **Performance Goals.Measurement Deleted Flag**	• Y • Y • Y	• Indicates that a goal measurement is added • Indicates that a goal measurement is updated • Indicates that a goal measurement is deleted
• **Task Created Flag** • **Task Updated Flag** • **Task Deleted Flag**	• **Performance Goals.Task Created Flag** • **Performance Goals.Task Updated Flag** • **Performance Goals.Task Deleted Flag**	• Y • Y • Y	• Indicates that a task is added to a performance goal • Indicates that a goal task is updated • Indicates that a goal task is deleted
• **Share Created Flag** • **Share Deleted Flag**	• **Performance Goals.Share Created Flag** • **Performance Goals.Share Deleted Flag**	• Y • Y	• Indicates if a share request is created for a performance goal • Indicates if a shared performance goal has been deleted in the goal plan
• **Align Created Flag** • **Align Deleted Flag**	• **Performance Goals.Align Created Flag** • **Performance Goals.Align Deleted Flag**	• Y • Y	• Indicates if an alignment request is created for a performance goal • Indicates if an existing alignment for a performance goal has been marked for deletion
Goal Source Code	**Performance Goals.Goal Source Code**	• HR • MANAGER • ORA_HRG_HR_MGR • ORG_OWNER • WORKER	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	A code that indicates the subtype of the performance goal **Note:** You can use subtypes to further classify a goal. You can configure subtypes based on your business requirements.
Weighting	**Performance Goals.Weighting**	A value between 0 and 999	Weight of the goal in the goal plan

Approval Condition	Condition Attribute	Attribute Value to Enable Manual Approval	Description
`Priority Code`	`Performance Goals.Priority Code`	• HIGH • MEDIUM • LOW	Priority of the goal, which can be **High**, **Medium**, or **Low**
`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

Payload Attributes for Goal Plans

These attributes of the transaction approval request pertain to goal plans:

- `transactionApprovalRequest.attribute1`: This maps to the name of the goal plan for which the approval transaction is submitted.

- `transactionApprovalRequest.attribute2`: This maps to the review period of the goal plan for which the approval transaction is submitted.

Subprocesses for Redwood Performance Goal Approvals

Use the subprocesses of the **Approve Performance Goal** rule in the Approval Rules tab of Transaction Console to configure the transactions that can bypass approvals.

Subprocesses List

This table lists the subprocesses that you can enable for bypassing approvals of performance goals in Redwood Goals Center.

Subprocess Name	Transaction That Can Be Bypassed
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 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.
Goal Cancel Action	Employee cancels 1 or more of their goals.
Goal Copy Action	Employee copies 1 or more of their goals.
Goal Delete Action	Employee deletes 1 or more goals from their goal plan.
Goal Extend Action	Employee extends 1 or more goals to another goal plan.

Subprocess Name	Transaction That Can Be Bypassed
Goal Move Action	Employee moves 1 or more goals to another goal plan.
Goal Share Action	Employee shares their goal.
Manage Goal Outcome	Employee adds, removes, or updates a goal's target outcomes.
Manage Goal Task	Employee adds, removes, or updates a goal's tasks.
Manage Organization Goals	Employee does any action such as add, update, delete, complete, cancel, move, or extend on a shared organization goal.

Note: You can also see the **Remaining Goal Actions** subprocess. This is for the goal actions other than that listed in the table. 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

As administrators, you can enable selective bypassing of approvals for performance goals in Transaction Console.

Bypass Approvals

Here's how you can selectively bypass approvals for some performance 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.

Results:

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 the Performance tab of their Goals Center 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.

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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** checkbox.
    d. Leave the **Expire only** option selected.
7. Click the **Commit** task icon in the **Tasks to be configured** toolbar.

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.

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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?	`Performance Goal.Target Outcome Created Flag`

Summary of the Tasks

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

1. Configure the **Approve Performance Goal** rule.
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.

Configure the Approve Performance Goal Rule

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

Configure Approvals for Development Goals

Configure Approval Rules for Development Goal Transactions

You can configure and define approval rules for the development goal transactions in Transaction Console.

Define Approvals in Transaction Console

From **Home** go to **Tools** > **Transaction Console**. Click the Approval Rules tab to manage the approval rule set for all Development Goal transactions. Use the **Approve Development Goal** task to review or modify the configuration of approval rules for development goals. The rule set has these two rules:

- Automatic Approval of Development Goals `DevelopmentGoalAutoApproval`

- Manual Approval of Development Goals `DevelopmentGoalManualApproval`

By default, the primary rule, Automatic Approval of Development Goals is enabled to automatically approve development goal transactions. When the conditions in this rule are met, the application doesn't generate any approval notifications. By default, all the conditions in this rule evaluate to the **True** state.

When you want to meet your specific development goal approval requirements, you need to modify the approval rule set. The secondary rule Manual Approval of Development Goals rule captures the requirements for triggering manual approvals using approval notifications. This rule triggers the approval notification flow. By default, all the conditions in this rule evaluate to the **False** state.

For each condition that you want to trigger approvals, you need to modify both the manual and automatic approval rules so that only one rule meets the conditions at any given time for a goal transaction. This table lists the basic Development Goals approval conditions and indicates the value that needs to be assigned for the condition attribute to enable the manual approval of development goal transactions.

Approval Condition	Condition Attribute	Attribute Value to Enable Manual Approval
New Goal	`Development Goals.Goal Added Flag`	`Y`
Delete Goal	`Development Goals.Goal Deleted Flag`	`Y`
Completed Goal	`Development Goals.Status Code`	`COMPLETED`
Updated Goal	`Development Goals.Updated Flag`	`Y`

You can configure these conditions to evaluate to the false state by adding the `NOT_` prefix to the attribute value in the expression. To ensure that the conditions evaluate to the true state, you need to remove the `NOT_` prefix from

their expressions. For example, to trigger approvals when new goals are created, in the manual approval rule, specify the condition `Development Goal.Goal Added Flag` to `True`. You need to set the value as `Y` instead of `NOT_Y`. And in the automatic approval rule, you need to add a new condition `DevelopmentGoal.Goal Added Flag!="Y"`.

> **Note:** If you don't want to use any approvals for development goals, you can select the **Bypass Approvals** option for the **Approve Development Goal** rule in Transaction Console.

Modify Approval Rule Set

You can modify the rule set of development goals to meet your specific approval requirements. Remember that there is only one manual approval rule along with its corresponding mutually exclusive automatic approval rule.

> **Note:** Ensure that the automatic and manual approval rules don't logically conflict or overlap. Errors may surface and development plans may get locked. Your administrator needs to use Transaction Console to either terminate the transactions or forcefully approve the transactions.

Add a New Development Goal Condition in the Rule Set

Apart from the basic conditions in the Manual Approval of Development Goals rule, you can add more conditions. Build expressions by using the development goal payload attributes. You need to add the condition to both the manual and automatic approval rules and ensure that the rules complement each other. Remember that the condition added in the automatic approval rule needs to be the inverse of the condition added to the manual approval rule.

> **Note:** When configuring multiple manual rules, the person who approves may receive multiple or even duplicate notifications.

Payload Attributes for Development Goals

You use payload attributes when defining approval conditions for development goal in Transaction Console.

Attribute	Description
BUSINESS_GROUP_ID	Indicates the business unit of the person's development goal
GOAL_TYPE_CODE	Indicates the type of goal as development
GOAL_NAME	Indicates the name of the development goal
DESCRIPTION	Indicates the description of the development goal
START_DATE	Indicates when the development goal was started
TARGET_COMPLETION_DATE	Indicates when the development goal is targeted to be completed

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Attribute	Description
PERCENT_COMPLETE_CODE	Indicates the percentage of completion of the development goal
STATUS_CODE	Indicates the status of the development goal
ACTUAL_COMPLETION_DATE	Date when the development goal was actually completed
GOAL_VERSION_TYPE_CODE	Indicates the development goal version
PRIORITY_CODE	Priority of the goal, which can be **High**, **Medium**, or **Low**
GOAL_SOURCE_CODE	A code that identifies who added the development goal to the goal plan, which can be employee, manager, or HR specialist.
PRIVATE_FLAG	Indicates that the development goal is private to the worker and can't be viewed by anyone else
LEVEL_CODE	Indicates the level of the development goal
CATEGORY_CODE	Indicates the category of the goal
ACTIVE_FLAG	Indicates if the development goal is active
SUCCESS_CRITERIA_TEXT	Indicates if the success criteria of the development goal was updated
COMMENTS_TEXT	Indicates if the development goal includes any comments
GOAL_CREATED_FLAG	Indicates if the development goal was created

GOAL_UPDATED_FLAG	Indicates if any of these key attributes for a development goal have been updated:
	
	• Name
	• Description
	• Success Criteria
	• Start Date
	• Target Completion Date
	• Priority
	• Category
	• Measurement:
	
	    ○ Unit of Measure
	    ○ Target Type
	    ○ Target Value

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Attribute	Description
ANY_GOAL_ATTR_UPDATED_FLAG	Indicates that any development goal attribute was updated and not just the key attribute. The updated attribute can also be an attribute of child objects such as measurements, tasks, and target outcomes.
GOAL_DELETED_FLAG	Indicates if the development goal was deleted
INTENT_CREATED_FLAG	Indicates if the development goal has any intents
INTENT_DELETED_FLAG	Indicates if any intents are deleted from the development goal
MEASUREMENT_CREATED_FLAG	Indicates if a goal measurement was added to the development goal
MEASUREMENT_UPDATED_FLAG	Indicates if a measurement associated with the development goal was updated
MEASUREMENT_DELETED_FLAG	Indicates if a measurement associated with the development goal was deleted
SHARE_CREATED_FLAG	Indicates that the development is shared
TARGET_OUTCOME_CREATED_FLAG	Indicates that a target outcome was added to the development goal
TARGET_OUTCOME_UPDATED_FLAG	Indicates if a target outcome associated with the development goal was updated
TARGET_OUTCOME_DELETED_FLAG	Indicates if a target outcome associated with the development goal was deleted
TASK_CREATED_FLAG	Indicates that a task was added to the development goal
TASK_UPDATED_FLAG	Indicates if a task associated with the development goal was updated
TASK_DELETED_FLAG	Indicates if a task associated with the development goal was deleted
GOAL_ID	Indicates the identifier of the development goal
GOAL_APPROVAL_STATE	Indicates the approval status of the development goal

Subprocesses for Redwood Development Goal Approvals

Use the subprocesses of the **Approve Development Goal** rule in the Approval Rules tab of Transaction Console to configure the transactions that can bypass approvals.

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Subprocesses List

This table lists the subprocesses that you can enable for bypassing approvals of development goals in Redwood Goals Center.

Subprocess Name	Transaction That Can Be Bypassed
Add Shared Colleague Goal	Employee adds a development goal that's shared by a colleague to their development plan.
Add Shared Manager Goal	Employee adds a goal that's shared by their manager to their development plan.
Goal Share Action	Employee shares their goal.

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

Configure Selective Bypass of Approvals for Development Goal Subprocesses

As administrators, you can enable selective bypassing of approvals for development goals in Transaction Console.

Bypass Approvals

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

1. Go to **Tools** > **Transaction Console**.
2. Click the Approval Rules tab.
3. Search for and select the **Approve Development Goal** rule.
4. Expand the **Approve Development 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 Development Goal** rule, **Bypass Approvals** is automatically enabled or disabled for all the subprocesses.

Results:

When you enable **Bypass Approvals** for any of the subprocesses, the corresponding development goal transaction is committed immediately. Users who did the subprocess action on the development goals in their development plan won't see the approval user messages on the Development tab of their Goals Center nor receive any notifications.

Development 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.

How You Define Expiration Policies for Development Goal Approvals

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

Your organization may want approvers to act on approval requests for development 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 development plan is withdrawn from the approval flow. The development plan is no longer locked. The user who submitted the development plan changes can review the development plan, update it, and resubmit it 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 **CareerDevApproveGoal** 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** checkbox.
   d. Leave the **Expire only** option selected.
7. Click the **Commit** task icon in the **Tasks to be configured** toolbar.

Example of Adding a Manual Approval Condition for Development Goals

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

Your organization wants the approval flow to be triggered when employees or managers delete a target outcome from a development goal.

Summary of the Tasks

You need to do these tasks to enable manual approval for deletion of target outcomes from development goals.

1. Configure the **Approve Development Goal** rule.
2. Disable automatic approval for deleting a target outcome from a goal.

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3. Enable manual approval for deleting a target outcome from a goal.
4. Save and submit your changes.

Configure the Approve Development Goal Rule

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

Disable Automatic Approval for Deletion of Target Outcomes

1. Select the **DevelopmentGoalAutoApproval** 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 **Development Goals** and then select **Target Outcome Deleted 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 Deletion of Target Outcomes

1. Select the **DevelopmentGoalManualApproval** 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 **Development Goals** and then select **Target Outcome Deleted 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**.

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8 Extend Redwood Goals Center Pages

Extend Redwood Goals Center Pages

Use the Express mode in Visual Builder Studio to control the fields, regions, and features of Redwood Goals Center that are available to your users.

Related Topics
- Overview of Redwood Application Extension
- Field and Region Display Control

Page Properties for Enabling or Disabling Performance Goal Features

Use page properties in Visual Builder Studio to enable various performance goal features in Redwood Goals Center.

This table lists the page properties that you need to enable for various performance goal features in Redwood Goals Center.

Page Property Name	Page	Effect of Enabling
Show Performance Tab	Goals overview page	Users can view the Performance tab in the Goals Center.
Enable Exploration of Goals	Goals overview page	Users can view the Explore tab in the Goals Center.
Show View Plan Details Button	Goals overview page	Users can view and use the **View Plan Details** button to view the goal plan details.
Show Print Button on Performance Tab	Goals overview page	Users can view and use the **Print** button to print the goals in the goal plan.
Show Copy Previous Goals Button	Goals overview page	The **Copy Previous Goals** button is displayed.
Show Submit button in the Edit by Approver Banner Message	Goals overview page	Approvers can view the **Submit** button in the banner message in the Edit by Approver flow.
Show Submit button in the Request for Information Banner Message	Goals overview page	Approvers can view the **Submit** button in the banner message in the Request for Information flow.
Enable Adding Comments and Attachments for Approval of Performance Goals	Goals overview page	Employees, managers, and approvers can add comments and attachments in the approval flow.

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Page Property Name	Page	Effect of Enabling
Show Option to Allow Assignees to Edit Goal Definition	• Goals overview page • New Goal and goal details • Goal plan detail • Perfromance goal mass assignment and share detail	Displays the checkbox to allow assignees to edit the goal definition attributes.
Disable Editing of the Allow Assignees to Edit Goal Definition Option	• Goals overview page • New Goal and goal details • Goal plan detail • Perfromance goal mass assignment and share detail	Managers can't select or deselect the checkbox to allow assignees to edit the goal definition attributes.
Show Option to Include Assigner	New Goal and goal details	Displays the checkbox to include the assigner in the goal assignment.
Disable Editing of the Option to Include Assigner	New Goal and goal details	Users can't select or deselect the checkbox to include themselves in the goal assignment.
Show Option to Include All Reports of Selected Managers	New Goal and goal details	Users can select or deselect the checkbox to include all reports of selected managers in the goal assignment.
Disable Editing of the Option to Include All Reports of Selected Managers	New Goal and goal details	Users can't select or deselect the checkbox to include all reports of selected managers in the goal assignment.
Show Organization Goals	Explore Goals	Displays organization goals on the Explore tab.
Show AI Assist Button on New Goal Page	New Goal	Managers and employees can use AI Assistance to generate a new goal.
Show Suggested Goals Button and Panel for Performance Goals	New Goal and goal details	Users can view the **View Suggested Goals** button and the Suggested goals panel drawer.
Show AI Suggested Goals Based on Previous Performance Documents	New Goal and goal details	AI suggested goals that are based on comments added by the manager in previous performance documents are displayed in the Suggested goals panel drawer.
Show Previous Goals in Suggested Goals Panel	New Goal and goal details	Previous goals of the employee are shown in the Suggested goals panel drawer.
Show Tasks Section for Performance Goals	New Goal and goal details	The Tasks section is shown for performance goals.
Show Attachments Section for Performance Goals	New Goal and goal details	The Attachments section is shown for performance goals.
Show Measurable Goal Switch for Performance Goals	New Goal and goal details	Users can view the switch that allows them to add measurements to the performance goal.
Show Target Outcomes for Performance Goals	New Goal and goal details	Displays the Target outcomes section for performance goals.
Control Text Formatting Options for Success Criteria, Comments, and Long Description	New Goal and goal details	Displays text formatting options in the menu bar of the **Success Criteria**, **Comments**, and **Long Description** fields.

Page Property Name	Page	Effect of Enabling
Control Text Formatting Options for Goal Progress	New Goal and goal details	Displays text formatting options in the menu bar of the progress note field.
Show Library Goal List of Values	• New Goal and goal details • Goal plan detail • Performance goal mass assignment and share detail	Displays the **Library Goal** list of values.
Show Aligned Goals Count	Team Goals Center overview page	Managers can view the count of aligned goals in their Team Goals Center.
Show Summary of Team's Performance Goals	Team Goals Center overview page	Displays the AI-generated summary of the manager's team's performance goals for the selected review period and goal plan.
Enable Exploration of Goals	Team Goals Center overview page	Displays the **Explore Goals** button on the Team Goals Center.
Show Measurable Task Switch for Library Goals	Library goal details	Users can view the switch that allows them to add measurements to the library goal's task.
Show Tasks Section	Library goal details	Users can view the Tasks section for library goals.
Show Target Outcomes Section	Library goal details	Users can view the Target outcomes section for library goals.
Show Delete All Assignees Action	Goal plans overview	Administrators can view the **Delete All Assignees** action that lets them delete all assignees of a goal plan.
Show Measurable Goal Switch	Goal plan detail	Users can view the switch that allows them to add measurements to the goals included in goal plans.
Show Add supporting documents Section	Goal plan detail	Users can view the Attachments section in goals included in goal plans.
Show Tasks Section	Goal plan detail	Users can view the Tasks section in goals included in goal plans.
Show Target Outcomes Section	Goal plan detail	Users can view the Target outcomes section in goals included in goal plans.

Page Properties for Enabling or Disabling Development Goal Features

Use page properties in Visual Builder Studio to enable various development goal features in Redwood Goals Center.

This table lists the page properties that you need to enable for various development goal features in Redwood Goals Center.

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Constant Name	Page	Effect of Enabling
Show Development Tab	Goals overview page	Users can view the Development tab in the Goals Center.
Show Print Button on Development Tab	Goals overview page	Users can view and use the **Print** button to print the goals in the development plan.
Enable Adding Comments and Attachments for Approval of Development Goals	Goals overview page	Employees, managers, and approvers can add comments and attachments in the approval flow.
Show AI Assist Button on New Goal Page	New Goal	Managers and employees can use AI Assistance to generate a new goal.
Show Library Goal List of Values	New Goal and goal details	Displays the **Library Goal** list of values.
Show Suggested Goals Button and Panel for Development Goals	New Goal and goal details	Displays the **Suggested Goals** button and panel drawer with the suggested development goals.
Show AI Suggested Goals Based on Previous Performance Documents	New Goal and goal details	Displays AI suggested development goals that are based on comments added by the manager in previous performance documents in the Suggested goals panel drawer.
Show Tasks Section for Development Goals	New Goal and goal details	The Tasks section is shown for development goals.
Show Learning Task Option for Development Goals	New Goal and goal details	Users can add a learning type of task to their development goal.
Show Attachments Section for Development Goals	New Goal and goal details	The Attachments section is shown for development goals.
Show Development Intents Section	New Goal and goal details	The Development intents section is shown for development goals.
Show Personal Intents Section	New Goal and goal details	The Personal intents section is shown for development goals.
Show Target Outcomes for Development Goals	New Goal and goal details	The Target outcomes section is shown for development goals.
Show Measurable Goal Switch for Development Goals	New Goal and goal details	Users can view the switch that allows them to add measurements to the development goal.
Show Option to Allow Assignees to Edit Goal Definition	New Goal and goal details	Displays the checkbox to allow assignees to edit the goal definition attributes.
Disable Editing of the Allow Assignees to Edit Goal Definition Option	New Goal and goal details	Managers can select or deselect the checkbox to allow assignees to edit the goal definition attributes.
Show Option to Include Assigner	New Goal and goal details	Displays the checkbox to include the assigner in the goal assignment.
Disable Editing of the Option to Include Assigner	New Goal and goal details	Users can't select or deselect the checkbox to include themselves in the goal assignment.
Show Option to Include All Reports of Selected Managers	New Goal and goal details	Users can select or deselect the checkbox to include all reports of selected managers in the goal assignment.

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Constant Name	Page	Effect of Enabling
Disable Editing of the Option to Include All Reports of Selected Managers	New Goal and goal details	Users can't select or deselect the checkbox to include all reports of selected managers in the goal assignment.
Control Text Formatting Options for Success Criteria and Comments	New Goal and goal details	Displays text formatting options in the menu bar of the **Success Criteria** and **Comments** fields.
Control Text Formatting Options for Goal Progress	New Goal and goal details	Displays text formatting options in the menu bar of the progress note field.
Show Summary of Team's Development Goals	Team Goals Center overview page	Displays the AI-generated summary of the manager's team's development goals.

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9 Secure Goal Actions

Privileges to Secure Goal Actions

You can now control the performance and development goal actions that are available to specific roles by assigning relevant privileges to that role.

Privileges For Performance Goal Actions

Assign the privileges listed in this table to custom roles to allow users assigned the role to perform the corresponding actions on performance goals.

Action	Privilege Code	Privilege Name	Delivered Roles that Have this Privilege by Default
Align	HRG_ALIGN_PERFORMANCE_GOALS_PRIV	Align Performance Goals	• Human Resource Specialist • Line Manager • Employee • Contingent Worker
Assign	HRG_ASSIGN_PERFORMANCE_GOALS_PRIV	Assign Performance Goals	Line Manager
Cancel	HRG_CANCEL_PERFORMANCE_GOALS_PRIV	Cancel Performance Goals	• Human Resource Specialist • Line Manager • Employee • Contingent Worker
Copy	HRG_COPY_PERFORMANCE_GOALS_PRIV	Copy Performance Goals	• Human Resource Specialist • Line Manager • Employee • Contingent Worker
Delete	HRG_DELETE_PERFORMANCE_GOALS_PRIV	Delete Performance Goals	• Human Resource Specialist • Line Manager • Employee • Contingent Worker
Extend	HRG_EXTEND_PERFORMANCE_GOALS_PRIV	Extend Performance Goals	• Human Resource Specialist • Line Manager • Employee • Contingent Worker

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Action	Privilege Code	Privilege Name	Delivered Roles that Have this Privilege by Default
Move	HRG_MOVE_PERFORMANCE_ GOALS_PRIV	Move Performance Goals	• Human Resource Specialist • Line Manager • Employee • Contingent Worker
Share	HRG_SHARE_PERFORMANCE_ GOALS_PRIV	Share Performance Goals	• Human Resource Specialist • Line Manager • Employee • Contingent Worker

Note: The privileges for the delete and cancel actions and the goal plan settings that allow workers and managers to delete or cancel HR-assigned goals determine if these actions will be available to the users. So, managers and employees will be able to cancel or delete HR-assigned goals only if they have the privilege to do so and the corresponding goal plan settings are enabled.

Privileges For Development Goal Actions

Assign the privileges listed in this table to custom roles to allow users assigned the role to perform the corresponding actions on development goals.

Action	Privilege Code	Privilege Name	Delivered Roles that Have this Privilege by Default
Assign	HRG_ASSIGN_DEVELOPMENT_ GOALS_PRIV	Assign Development Goals	Line Manager
Copy	HRG_COPY_DEVELOPMENT_ GOALS_PRIV	Copy Development Goals	• Human Resource Specialist • Line Manager • Employee • Contingent Worker
Delete	HRG_DELETE_DEVELOPMENT_ GOALS_PRIV	Delete Development Goals	• Human Resource Specialist • Line Manager • Employee • Contingent Worker
Share	HRG_SHARE_DEVELOPMENT_ GOALS_PRIV	Share Development Goals	• Human Resource Specialist • Line Manager • Employee • Contingent Worker

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