

# Oracle Fusion Cloud Talent Management

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**How do I configure notifications for performance documents?**

fa-latest



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Thanks for helping us improve our user assistance!



# 1 How do I configure notifications for performance documents?

## Overview of Notifications

As an administrator, you can configure and send notifications to different roles such as the HR specialist, manager, and employee for various performance management tasks.

You can send notifications in these scenarios, for example:

- Notification to a manager when a worker completes their self-evaluation in a performance document.
- Notification to the feedback provider when you request feedback from them.

You can configure notifications for tasks related to performance documents and participant feedback using either **My Client Groups > Talent Notifications** or **Setup and Maintenance > Performance Notifications**. When you enable notifications, users are notified by email or through the notifications icon on the global header.

## Performance Document Task Alert Notifications

You can alert workers and managers before a task is due. You can set up one-time, or repeat notifications, for standard and critical alerts in the Process step when configuring the performance template.

If you set up the standard and critical alerts, notifications are sent for all performance documents created from the template. The notifications are sent when the task is available to begin. For example, the task must be the first in a created performance document, or the previous task must be completed.

### Standard and Critical Alert Days

Enter the number of days before a performance document task is due to send standard or critical alerts to remind workers and managers of the deadline. The notification is sent once for each alert. You enter the number of days before the due date on the Process step of the performance template. Enter the due date for each task on the Document Periods step of the performance template.

You can enter either, or both, standard and critical alert days. The number of standard alert days must be greater than the number of the critical alert days as standard alerts are sent before critical alerts.

If you edit the task due dates for performance documents for specific workers using the Change Due Dates task, the settings in the template aren't affected. The notifications are sent the specified number of days before the task due date.

### Repeat Standard and Critical Alerts

You can also select the options to send repeat standard and critical alerts until the task is completed.

## Send Performance Document Alert Notifications

You must run the Send Performance Document Alert Notifications scheduled process to send notifications for a task deadline.

You can run the process from **Tools > Scheduled Processes > Schedule New Process**.

It's recommended that you set the process to send notifications daily. If you select the options to send both standard and critical alerts, workers and managers receive notifications according to the following schedule:

- Standard alerts are sent according to the process job schedule, such as daily, or weekly, starting from the specified standard alert days before the task is due.
- Critical alerts are sent starting from the specified critical alert days, adhering to the process job schedule until the task is completed.

For example, assume that you set the standard alert to be sent 14 days before a task is due, and the critical alert to be sent 7 days before the task due date. In addition, you set the process schedule to send notifications daily. If you enable the repeat alerts for both the standard and critical alerts, the standard alert is sent every day between 14 and 7 days before the task due date. Then, the critical alert is sent daily for the 7 days before the task due date and continues to until the task is completed. If you set only one or the other of the standard or critical alert days to repeat, the notifications are sent starting from the number of the days before the task is due until the task is completed, according to the process job schedule.

The notifications stop when the task is completed for the respective role, or the performance document is completed. For example, when the worker submits a completed a task, the worker no longer receives notifications. However, for tasks that aren't completed, you must turn off the notifications to prevent them from continuing even after the task is due. To turn off the notifications, you must either:

- Deselect the options in the performance template and save the template.
- Turn off the scheduled process.

## Worklist and Email Notifications

You can set up approvals and the associated notifications using the Define Approval Management for Human Capital Management task.

When you activate notifications, each approver receives worklist and email notification that a document was submitted for approval. The notification contains a link to the performance document so the approver can view it. When all approvers have approved or rejected the document, the worker's manager receives notification that the document was approved or rejected.

The approval process is repeated if a manager resubmits a document after rejection, or a second approval task is configured in the process flow.

If the performance document is approved, the next task in the process flow becomes available or if the approval is the last task, the performance document is completed. If the approval is rejected, then the previous task in the process flow becomes the current task so any requested changes can be made before the approval task is resubmitted.



To add the HR specialist as an approver, you must also add an area of responsibility for the HR specialist using the Areas of Responsibility task in **My Client Groups > Quick Actions > Areas of Responsibility**.

