



Goal Management Admin Guide



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Guide Usage and Disclosures	2
Guide Information	2
How To Use This Guide	2
Overall Process Flow	2
Glossary of Terms	
Day to Day Operations Guide	5
Manage Goal Library	5
Manage Review Periods	11
Add Goal Plans	14
Edit Goal Plan	
End Goal Plan	24
Manage Scheduled Processes	
Manage Eligibility Profiles	
Create Eligibility Profiles	
Edit Eligibility Profiles	
Assign Goal Plan & Monitor Process Results	40
Edit A Worker Goal	44
Delete A Worker Goal	47
Cancel A Worker Goal	
Mass Assignment Of Goals	

Guide Usage and Disclosures

Guide Information

This guide is designed based on the Oracle Cloud HCM delivered setups; some fields may differ from your instance configurations. For example, some fields may be required in this guide that are not required in your instance. Additionally, some of the training topics discussed in this guide may not apply to your organization, but we know you'll find it helpful. If you would like a custom guide for your organization, please contact our Training Team at learn@camptratech.com.

How To Use This Guide

This guide is intended to assist Admin users with their day-to-day tasks in Oracle Cloud. A few notes before you begin:

- Any fields with an asterisk are required fields.
- Based on your configurations, approval workflows may in place for the training topics below; those tasks would need to be approved before the additions or updates are visible in your instance.
- You may have specific flexfields in your instance that require inputs; this guide is a generic tool and will not include those specific flexfields. You will see those fields as a context segment or not visible at all in our Oracle instance.

Overall Process Flow

Before we begin with the training content, It's important to understand the overall process flow of information in Oracle Cloud for the Goal Management module.



Glossary of Terms

Here we've included common terms associated to the Goal Management module. Please review the terms below to familiarize yourself with the Oracle Cloud terms used throughout this guide.

Goals

Defined objectives that employees are expected to achieve in a given period

Goal Plans

 Goal plans are used to manage a collection of performance goals for a specific period

Goal Plan Sets

Goal plan sets are used to group and assign performance goal plans to a population set. Each goal plan set is associated with a review period.

Goal Library

A repository of Goals.

Eligibility Profile

Determine which workers are eligible for a plan, compensation object, and checklist task. Based on the criteria within the profile, this will determine eligibility.

Scheduled Processes

A process or job scheduled to run for a specific reason; i.e Assign Goal Plan

Review Periods

Review periods enable the organization to organize your processes around goal management and performance evaluations into time-bound business cycles.

Performance Goal Measurements

Goal measurements help to assess the level of success of achieving the performance goal.

Target Outcome

Target outcomes are specific skills, competencies, or certifications added to a goal that can be achieved or acquired by the successful completion of the goal.

Check-In Templates

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Check-in templates are documents used to check-in with employees. They are associated with all review periods. When we create a check-in document based on the template, these goals for the review period are included in the check-in document.

Tasks

Tasks are specific actions added to a goal that a worker need to accomplish in order to achieve the goal.

Day to Day Operations Guide

Manage Goal Library

Navigation: Home>My Client Groups>Goals>Performance Goal Library>Add>Enter Info>Save

From the home screen, click My Client Groups

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Next, click Performance Goal Library

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	Click Performance Goal Library	
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	Scheduled Processes for Performance Goals	

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Manage Review Periods

Navigation: Home>My Client Groups>Goals>Review Period>Create Review Periods>Enter Info>Save and Close>Ok

From the home screen, click **My Client Groups**

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Click **Search** to view the existing **Review Periods**. We can edit an existing review period by selecting the **Review Period Name**

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2021 Annual Cycle	Active	1/1/21	12/31/21	Yes
2020 Annual Cycle	Active	1/1/20	12/31/20	Yes
2019 Annual Cycle	Active	1/1/19	12/31/19	Yes
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Enter the **Review Period** information and click **Save and Close**, then **Ok**

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Add Goal Plans

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Goal Plan Name		Status		
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Review Period		External ID		
All		300000255682545		
Description				
Having understanding of an organizati	on from different perspectives and understanding the	e alignment between different departments is pro	gressively imperative in businesses.	
Allow Updates to Goals By		Goal Weights		
HR specialist and manager		Enabled		
Defense Devent Terr		LINDICA		
Annual Eval Sync. Annual Evaluation A	nytime Document	Sum of goal weights must be 100%		
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	HR specialist, manager, and worker		
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	Actions	Click Add	
		There's nothing here so far.	
	Selected Eligibility Profiles	~	
	Selected Eligibility Profiles		
	Included Workers	~	
	Excluded Workers	~	

Here we can select a Goal from the **Goal Library** or Enter the information to create a new Goal. From the dropdown, select the **Library Goal.** Click **OK**

				<u>ok</u>
			Click OK	The second
			Chek OK	
Basic Into		elect Library Goal		
Library Goal	Library Goal	elect Library order		
Select a value		Allow worker to u	apdate key attributes	
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10-15 Customer Calls Per Week			~	
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20-25 Customer Calls Per Week	Sales		rs and Manapers on HR-Assigned Goals	
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Align Objective execution with culture an	d ethics of the organisation			
Attend One Hour of Training Each Week			_	
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Category Select a value Success Criteria	マ 			

Next, scroll down to the **Selected Eligibility Profiles**. To add an **Eligibility Profile**, click **Add**

"Review Period		Actions for Workers and Managers on HR-Assigned Goals		
2023 Annual Cycle	~	Cancel only ~		
"Start Date		Performance Document Types		
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Allow Updates to Goals By		L]		
HR specialist, manager, and worker	~			
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Selected Eligibility Profiles			+ Add	
		Click Add		
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Select the **Eligibility Profile** from the dropdown and click **Save**

*Start Date		Performance Document Types	
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*End Date		*Evaluation Type	
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HR specialist, manager, and worker	~		
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C = 3+ Months Working		Click Save	
Se		Onch Dave	
70 and Above		Save	Cancel
ACA Eligibility	-		
Select a value			
		Select Eligibility Profile	
Included Workers			

Ine the next two sections, we can **Include or Exclude Workers**. To add a worker to Include, click **Add**

d Goal Plan			Save and Close	Cance
	Archer wegns Enforce sum of goal weights to 100%		1 6 . G. C.	STOC ST
	*Allow Updates to Goals By			
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	Selected Eligibility Profiles	+ Add ^		
	ACA Eligibility	/		
	Included Workers	+ Add ^		
	Click Add			
	Excluded Workers	+ Add ^		
	There's nothing here so far.			

Next, Enter the **Workers Name**, select the **Worker** and click **Save**

	*Allow Updates to Goals By HR specialist, manager, and worker	~		
	Goals			
	Selected Eligibility Profiles			
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	Test	~	Click Save	
			Enter Workers Name	
	Evoluted Workers			
	excluded workers			
		-		

We can follow this same process to add **Excluded Workers**. Once complete, click **Save and Close**

Add Goal Plan			Save and Close Cancel
	Allow Updates to Goals By HR specialist, manager, and worker	Click Save and Close	
	Goals	~	
	Selected Eligibility Profiles	+ Add	
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	Excluded Workers	+ Add ^	
	HT Harry Test Talent Generalist	×	[

Edit Goal Plan

Navigation: Home>My Client Groups>Goals>Review Period>Goal Plans>Edit>Save and Close

From the home screen, click My Client Groups

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	Things to Finish	1 - March 10						

Next, click Goals

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Next, click Goal Plans

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Goals		
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	Eligibility Profiles Click Goal Plans	
	8 Setup of Performance Goals Mass Assignment and Mass Sharing	
	8 Scheduled Processes for Performance Goals	
		- 2012년 201

Here we can view the existing **Goal Plans** for the **Review Periods.** To edit the **Primary Goal Plan**, click **Edit**

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Goal Plans			
Pri	mary Plan	Edit	
	Goal Plan Name Transdisciplinary skills	Status Click Edit	
	Review Period All	External ID 30000255682545	
	Description Having understanding of an organization from different perspectives and understanding th	e alignment between different departments is progressively imperative in businesses.	
1월 FE EFE	Allow Updates to Goals By HR specialist and manager	Goal Weights Enabled	
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Edit the applicable details and click Save

[*] Goal Plan Name	Status	Save Cancel
Transdisciplinary skills	Inactive v	
Review Period All	External ID 300000255682545	
Description		
Allow Updates to Goals By	*Evaluation Type	
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To Edit **Other Plans**, select the **Review Period** and select the **Goal Plan** we wish to **Edit**

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Click Edit to edit the Plan Details

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Edit the applicable details and click **Save**

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성장 승규는 것을 가 없다.	2022 Manufacturing Goal Plan		Active	
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End Goal Plan

Navigation: Home>My Client Groups>Goals>Review Period>Goal Plans>Edit>Save

From the home screen, click My Client Groups

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Next, click Goals

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Next, click Goal Plans

Goals		
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	Eligibility Profiles Click Goal Plans	
	8 Setup of Performance Goals Mass Assignment and Mass Sharing	
	80 Scheduled Processes for Performance Goals	

Here we can view the existing **Goal Plans** for the **Review Periods.** To End the **Primary Goal Plan**, click **Edit**

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Next, from the **Status** drop down, click **Inactive** and click **Save**

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Goal Plans			
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	imperative in businesses.		
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To End **Other Plans**, select the **Review Period** and select the **Goal Plan** we wish to **End**

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Click Edit to edit the Plan Details

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Lastly, from the **Status** drop down, click **Inactive** and click **Save**

2022 Manufacturir	ng Goal Plan		
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			Save Cancel
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	Click Inactive		
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Manage Scheduled Processes

Navigation: Home>My Client Groups>Goals>Scheduled Processes For Performance Goals>Select Process>Select Action

From the home screen, click My Client Groups

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Next, click Goals

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Next, click Scheduled Processes for Performance Goals

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	what do you want to do or manage?	
	Search for tasks Q	
	8 Performance Goals	
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	Review Periods	
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	Eligibility Profiles	
	800 Setup of Performance Goals Mass Assignment and Mass Sharing	
	Scheduled Processes for Performance Goals	
	Click Scheduled Processes for Performance Goals	

Here we can view the existing **Scheduled Processes.** Click **Monitor Process** to view the status of the current **Scheduled Process**

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\checkmark Scheduled Processes for Performance Goals \odot				Monitor Process
This process will be queued up for submission at position 1			Click Monitor Process	
			Process Options Advanced	Submit Cancel
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Here we can view the status of the **Scheduled Processes**

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To manage a **Scheduled Process**, click the **Name** to highlight the row

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Next, select the applicable **Action** for the **Scheduled Process**

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Manage Eligibility Profiles

Navigation: Home>My Client Groups>Eligibility Profiles>Search>Review

From the home screen, click My Client Groups

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Next, click Eligibility Profiles

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Select the **Profile Usage** from the drop down and click **Search**

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Retail Store Eligibility	Goals Management	Participant	Active		Any assignment - enterprise		Performance	Click Goal Management
SMF Roles	Goals Management	Participant	Active		Any assignment - enterprise		Personal Brand	
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Create Eligibility Profiles

Navigation: Home>My Client Groups>Eligibility Profiles>Create>Submit

From the home screen, click My Client Groups

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Next, click Eligibility Profiles

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Click Create then Create Participant Profile

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Enter the Eligibility Profile Definition and add the Eligibility Criteria

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Edit Eligibility Profiles

Navigation: Home>My Client Groups>Eligibility Profiles>Search>Edit>Save and Close

From the home screen, click **My Client Groups**

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Next, click Eligibility Profiles

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CF Roles	Goals Management	Participant	Active		Any assignment - enterprise		Opportunity Marketplace	
Retail Store Eligibility	Goals Management	Participant	Active		Any assignment - enterprise		Performance	Click Goal Management
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Click the **Eligibility Profile Name** we need to **Edit**

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Edit the applicable information and click Save and Close

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Assign Goal Plan & Monitor Process Results

Navigation: Home>My Client Groups>Goals>Scheduled Processes For Performance Goals>Assign Goal Plan>Enter Details>Submit>OK

From the home screen, click My Client Groups

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Next, click Scheduled Processes for Performance Goals

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	8 Scheduled Processes for Performance Goals	
	Click Scheduled Processes for Performance Goals	

Next, click **Process Type** and from the drop down, click **Assign Goal Plan**

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✓ Scheduled Processes for Performance Goals [®]	Monitor Process
This process will be queued up for submission at position 1	Process Options Advanced Subgit Cancel
Name Manage Goal Scheduled Process	
Description Initiates the scheduled process for assigning or updating worker goals.	Notify me when this process ends
Schedule As soon as possible Submission	Notes
Basic Options Parameters Olick Drop down	
Process Type Assign our store guide Click Assign Goal Plans	μ

Enter the Basic Options and click Submit

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Description Initiates the scheduled process for assigning or updating worker goals.	Notify me when this process ends	
Schedule As soon as possible	Submission Notes	
Basic Options Parameters Enter, the below information		
*Process Type Assign goal plans		
*Process Name 2022 Sales Goal Plan - Sales Team V		
Goal Plan Start Date 1/1/22		
Goal Plan End Date 12/31/22		
Effective Date 1/1/22		
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Lastly, click Monitor Process

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Here we can view the **Scheduled Process Status**

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Edit A Worker Goal

Navigation: Home>My Client Groups>Goals>Performance Goals>Search Worker Goal>Edit>Enter Details>Save

From the home screen, click **My Client Groups**

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Enter the **Review Period** and the **Worker** and the goals will populate

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	Expand All Collapse All	Status Weight Not started 30%	
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Select Review Period	Test Sarah V	Cut Travel Expenses by 30% in order to maintain expense reduction initiative. Make use of value for money	
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Here we can **Edit** the Goal Details. To **Edit** the **Basic Info**, click **Edit**

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Delete A Worker Goal

Navigation: Home>My Client Groups>Goals>Performance Goals>Search Worker Goal>Select Goal>Actions>Delete>OK

From the home screen, click My Client Groups

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Next, click Goals

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Select Review Period	~ Worker Clear	1000009 Payroll Time Specialist	
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Next, click **Actions** then **Delete**. Click **OK**. As a note, if **Delete** is gray, the ability to delete a goal as an HR Specialist has been disabled. This will need to be enabled in order for an HR Specialist to Delete a Goal

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Cancel A Worker Goal

Navigation: Home>My Client Groups>Goals>Performance Goals>Search Worker Goal>Select Goal>Actions>Cancel>OK

From the home screen, click My Client Groups

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Next, click Goals

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Next, click Performance Goals

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	Scheduled Processes for Performance Goals	

Enter the **Review Period** and the **Worker** and the goals will populate

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Select the Goal

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Next, click **Actions** then **Cancel**. Click **OK**. As a note, if **Cancel** is gray, the ability to cancel a goal as an HR Specialist has been disabled. This will need to be enabled in order for an HR Specialist to Cancel a Goal

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Mass Assignment Of Goals

Navigation: Home>My Client Groups>Goals>Setup of Performance Goals Mass Assignment and Mass Sharing>Select Review Period>Add>Enter Info in each section>Save and Close

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From the home screen, click My Client Groups

Next, click Goals

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Next, click Setup of Performance Goals Mass Assignment and Mass Sharing

What do you want to do or manage?	
Search for tasks Q	
Performance Goals	
Performance Goal Library	
Review Periods	
Goal Plans	
Eligibility Profiles	
8 Setup of Performance Goals Mass Assignment and Mass Sharing	
Scheduled Processes for Performance Goals Cick Setup of Performance Goals Mass Assignment	and Mass Sharing

Select the Review Period

	Goal Processes			+ Add	
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Select Review Period	∧ Goal Plan				
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Enter the **Details.** We can Mass assign goals or Mass share goals as the **Process** type

Details Enter the below	winformation	
*Process Type Mass assign goals v	* Goal Plan Transdisciplinary skills	~
Company XYZ - Mass Performance Goals Review Period Z023 Annual Cycle V	Select a value	Ý
Exclude workers who aren't part of the goal plan		
Selected Eligibility Profiles		~
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Goals		V

Next, to select the **Eligibility Profiles**, click **Add**

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Mass Assign and Share	e Performance Goals		Save and Close
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Select the Eligibility Profile, click Required and then Save

are Performance Goals		Save and Close
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Next, to select the Included Workers, if applicable, click Add

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Enter the Workers Name in the drop down and click Save

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Caela		

Lastly, to add the Goals to mass assign, click $\boldsymbol{\mathsf{Add}}$

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Enter the **Basic Info** and Click **OK**

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			Click OK
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20-25 Customer Calls Per Week		setting of the goal plan.	
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Lastly, click Save and Close

Details		Click Save and Close	
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Thank you for reviewing and using our guide; we hope you have found it helpful. If you have any questions on the content included in this guide, please contact our Training & Learning team at learn@camptratech.com

Version History	Revision Date	Author	Changes
Version 1.0		Megan Ketter	Initial Version