



2024

Goal Management Admin Guide



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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.

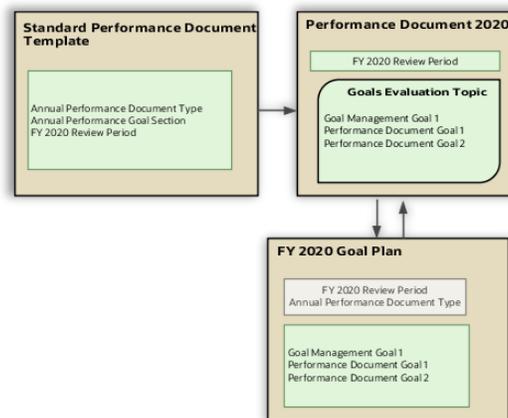
How To Use This Guide

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

- ❖ 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

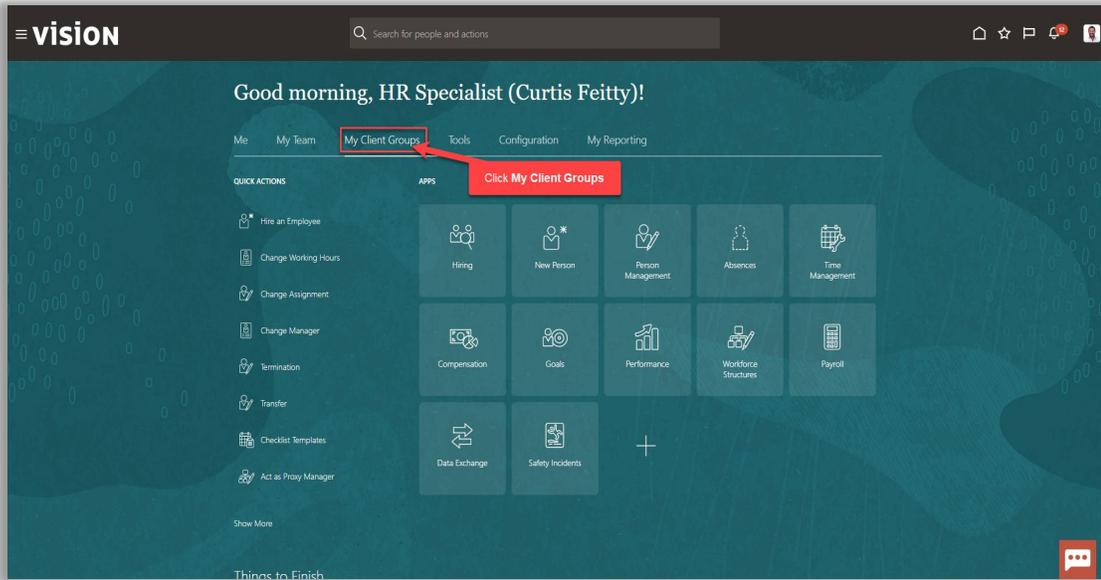
- ❖ Tasks are specific actions added to a goal that a worker need to accomplish in order to achieve the goal.

Day to Day Operations Guide

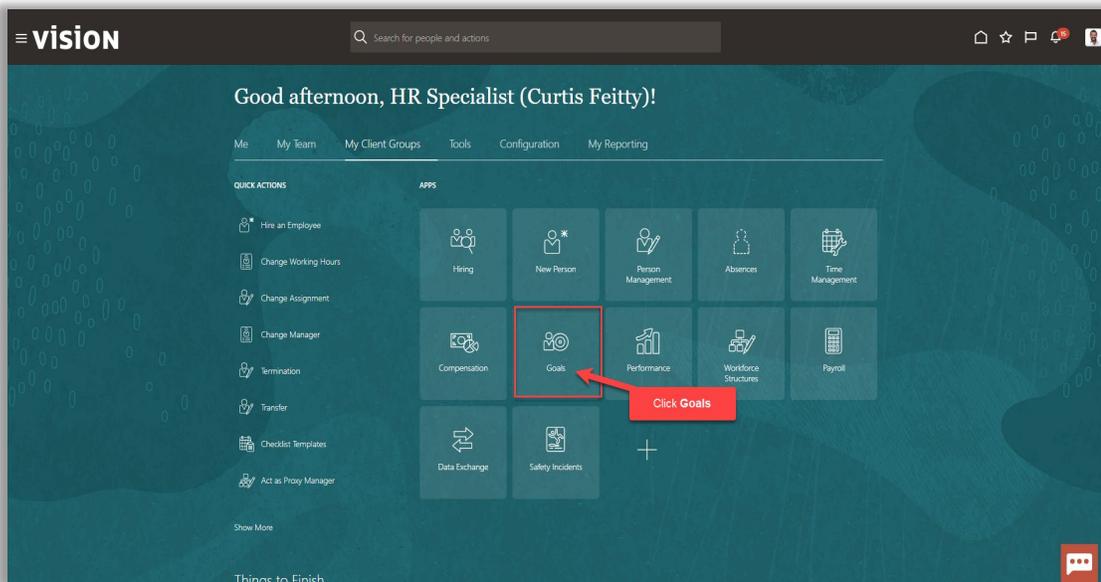
Manage Goal Library

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

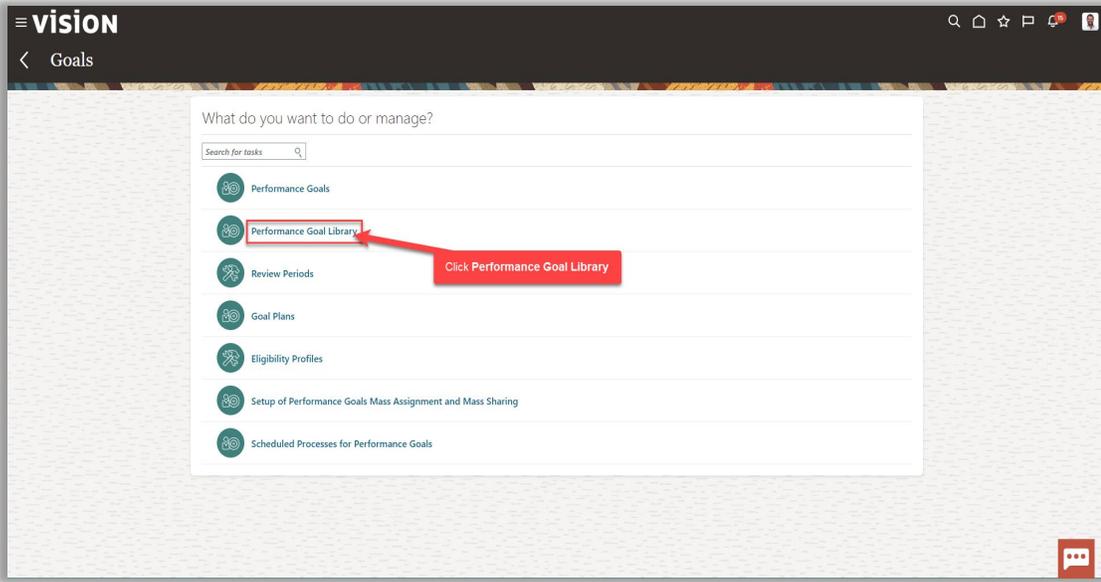
From the home screen, click **My Client Groups**



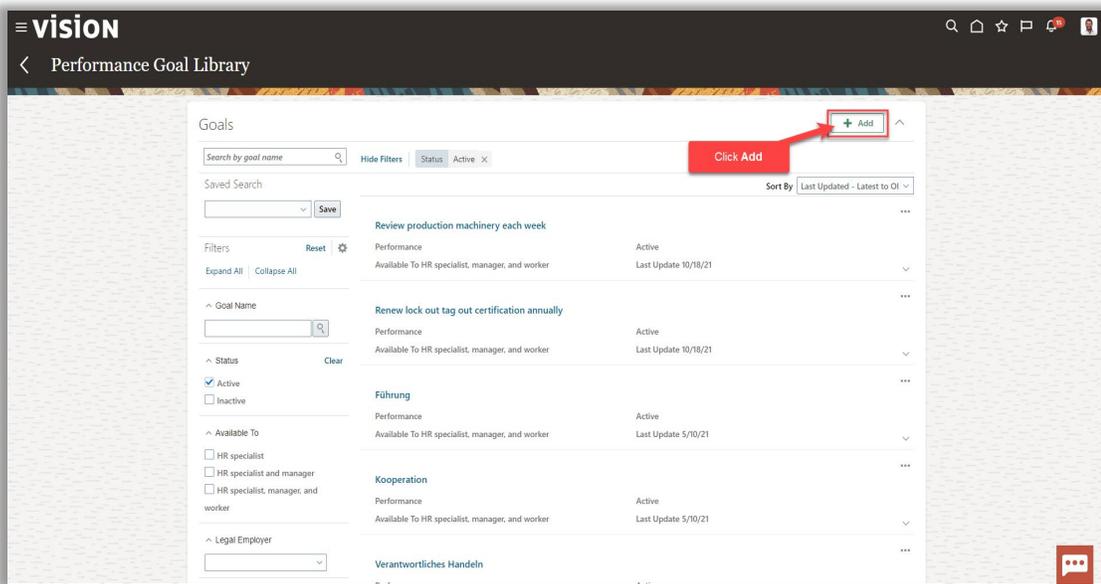
Next, click **Goals**



Next, click **Performance Goal Library**



Here we can view the Goals in the **Performance Goal Library**. To add a Goal, click **Add**



Enter the **Library Info**

vision
Add Goal

Save and Close Cancel

Enter the below information

Library Info

Status: Active
Business Unit: Federal US Business Unit
Type: Performance
Department: Accounting HC US
Available To: HR specialist, manager, and worker
Job Family: Select a value
Legal Employer: Progress US Legal Entity
External ID: 300000255868462

Basic Info

*Goal Name
Description
Start Date: m/d/yy
Target Completion Date: m/d/yy
Subtype: Select a value
Level: Select a value

Enter the Basic Info

Add Goal

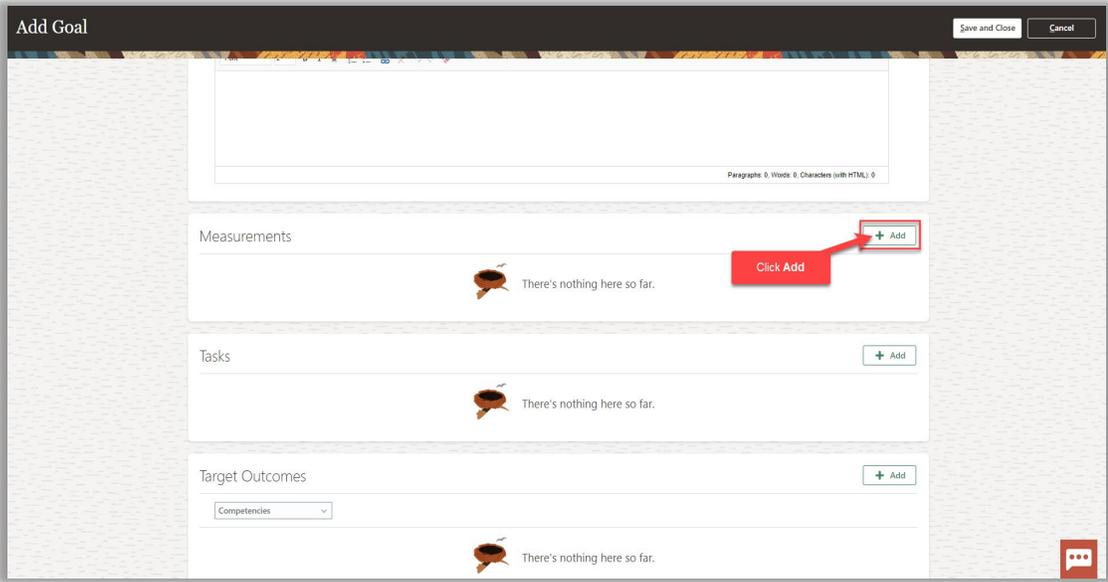
Save and Close Cancel

Enter the below information

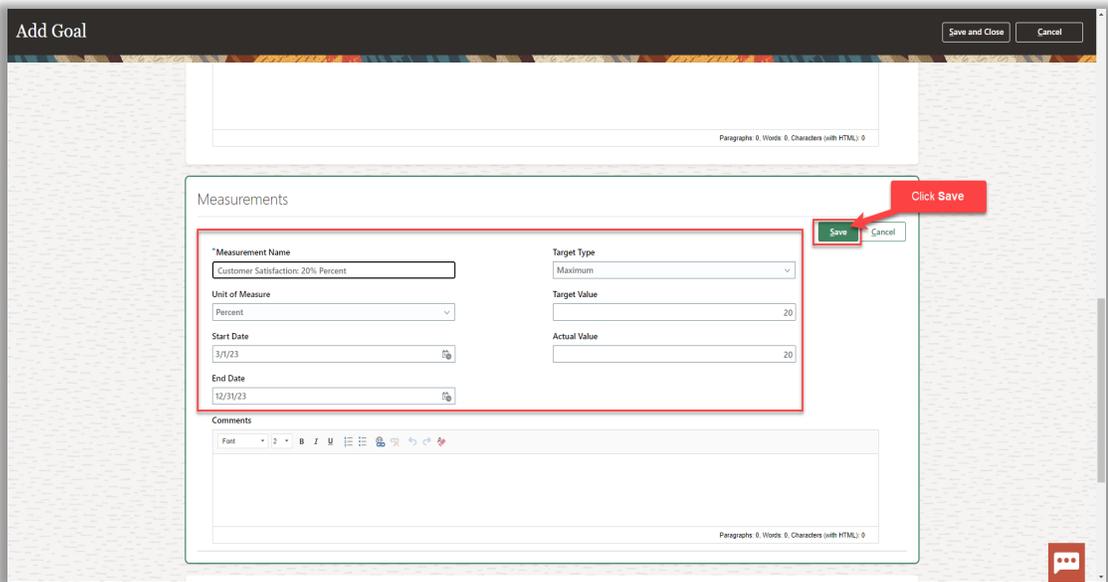
Basic Info

*Goal Name: Increase Customer Satisfaction
Description: This initiative is to increase customer satisfaction. This will be measured by the data collected on feedback surveys.
Start Date: 3/1/23
Target Completion Date: 12/31/23
Priority: High
Category: Customer satisfaction
Subtype: Select a value
Level: Select a value
Related Link:
Success Criteria: This goal will be met if customer satisfaction is increased by 20%

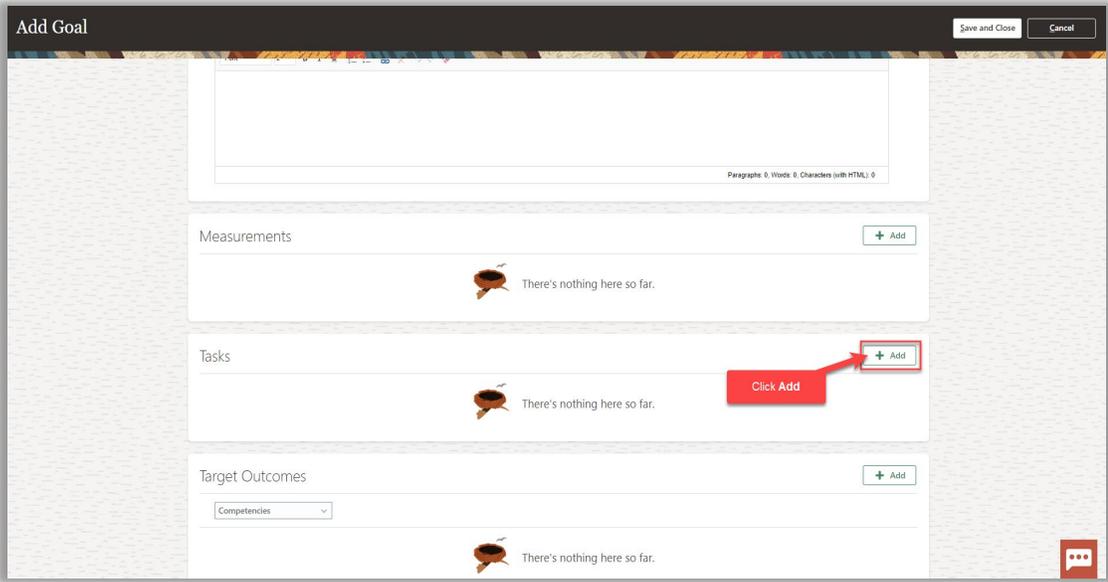
Click **Add** across from **Measurements** to enter **Measurements Information**



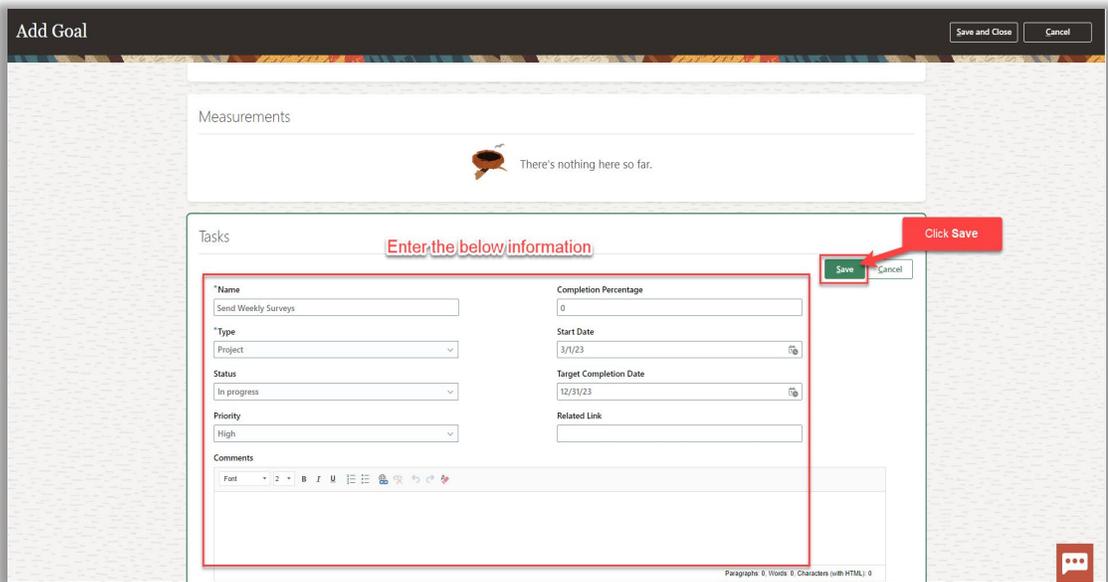
Enter the **Measurements** information. Click **Save**



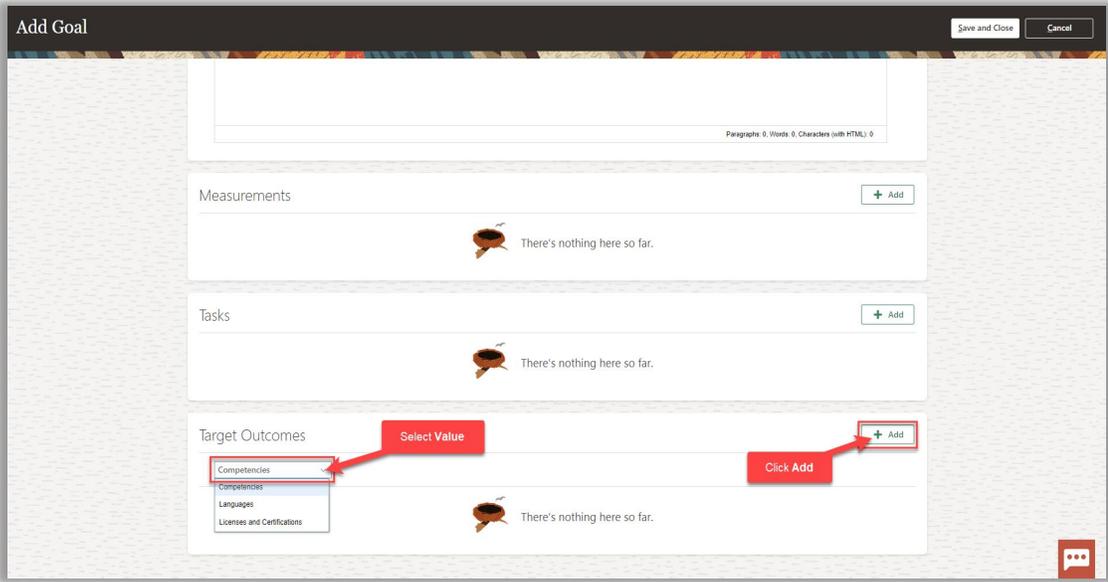
Click **Add** across from **Tasks** to enter **Tasks** Information



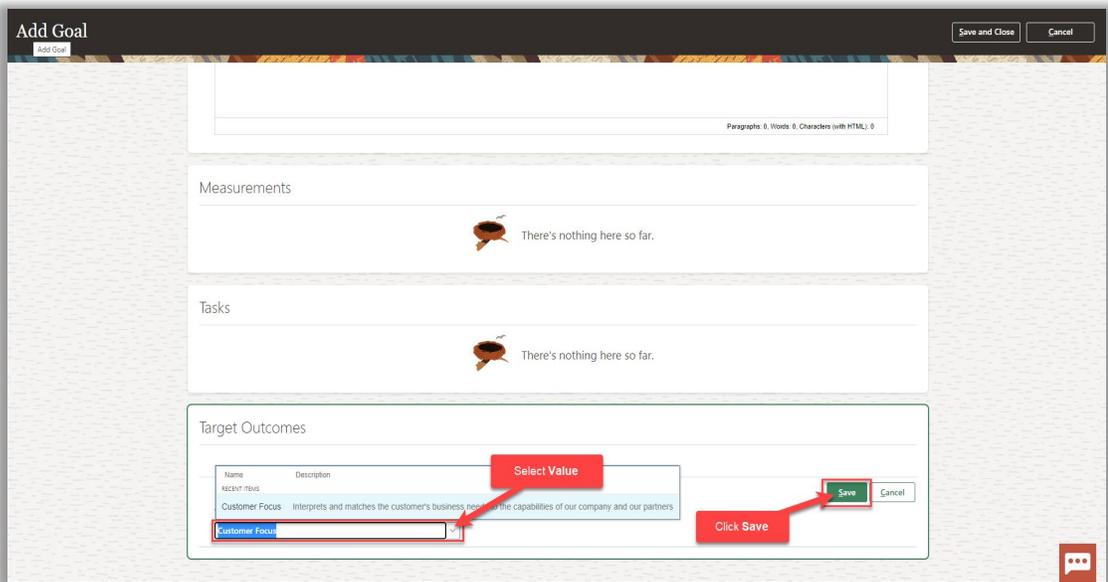
Enter the **Tasks** information. Click **Save**



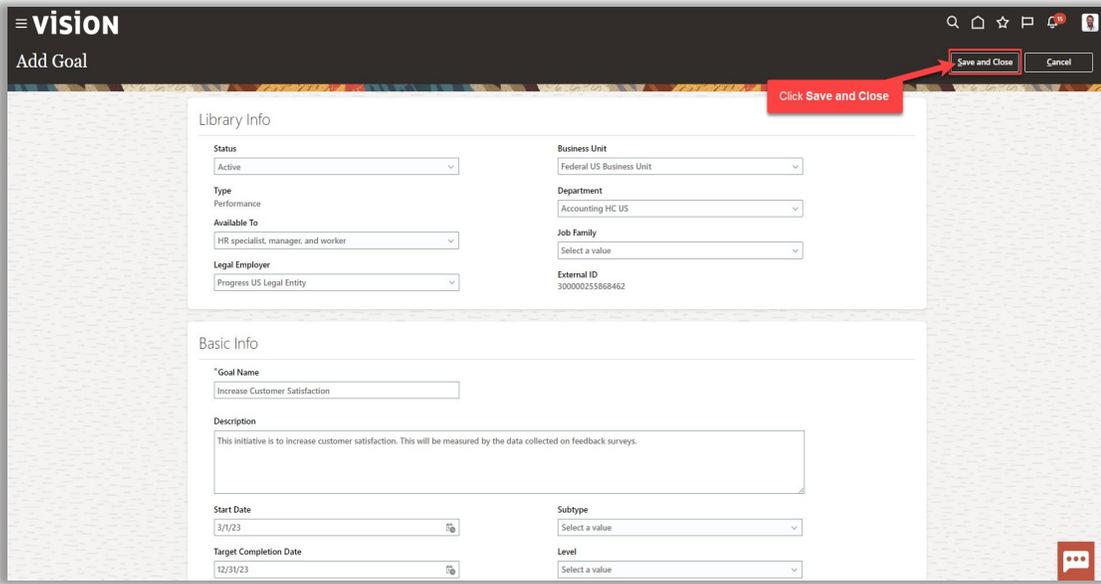
Next, select the Target Outcome type for the dropdown click **Add** across from **Target Outcomes**



Select the **Target Outcome** from the dropdown. Click **Save**



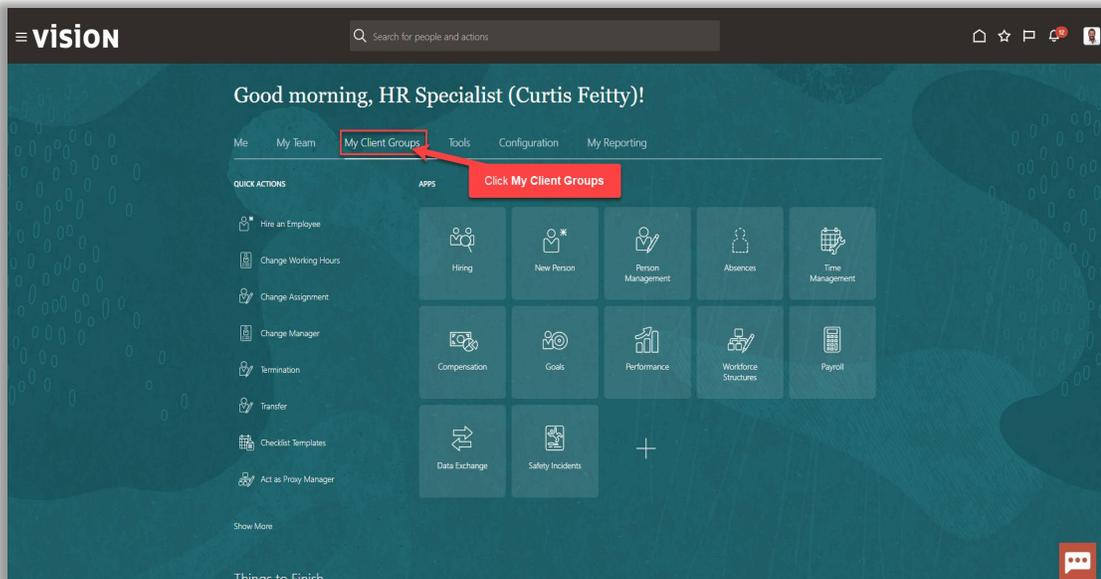
Lastly, click **Save and Close**



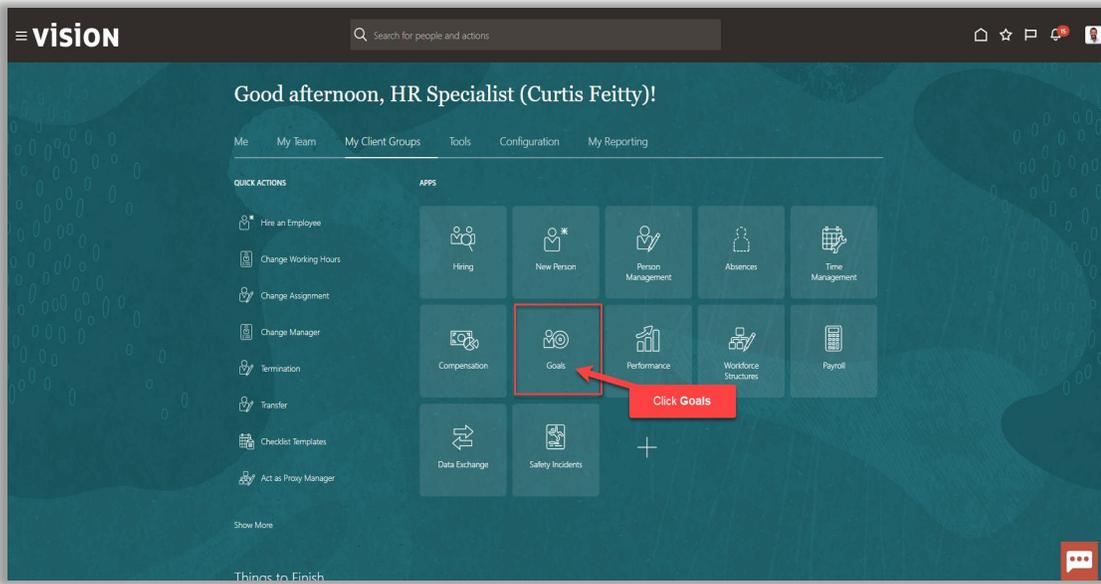
Manage Review Periods

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

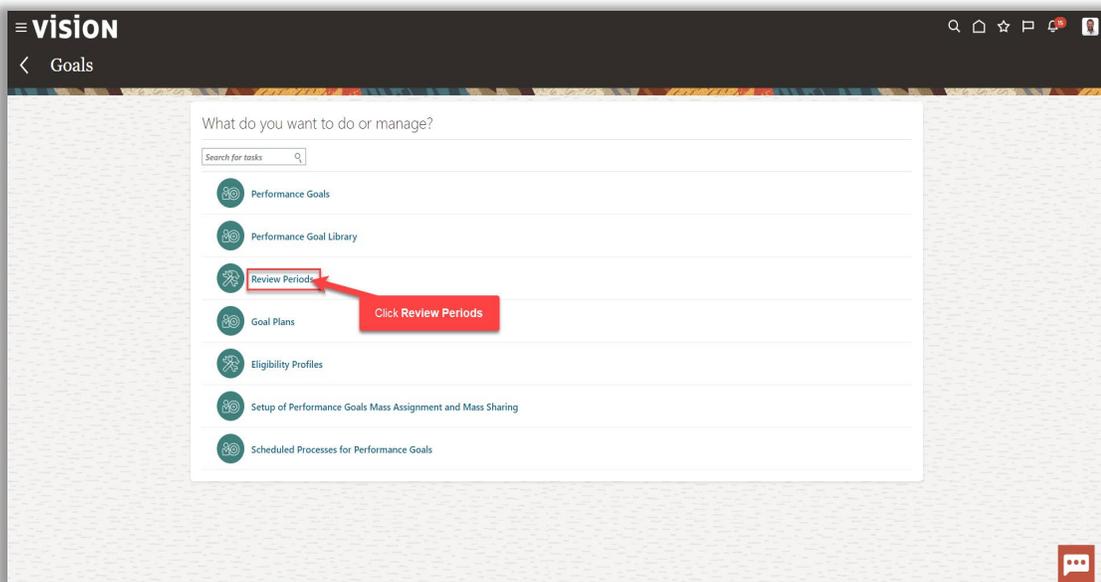
From the home screen, click **My Client Groups**



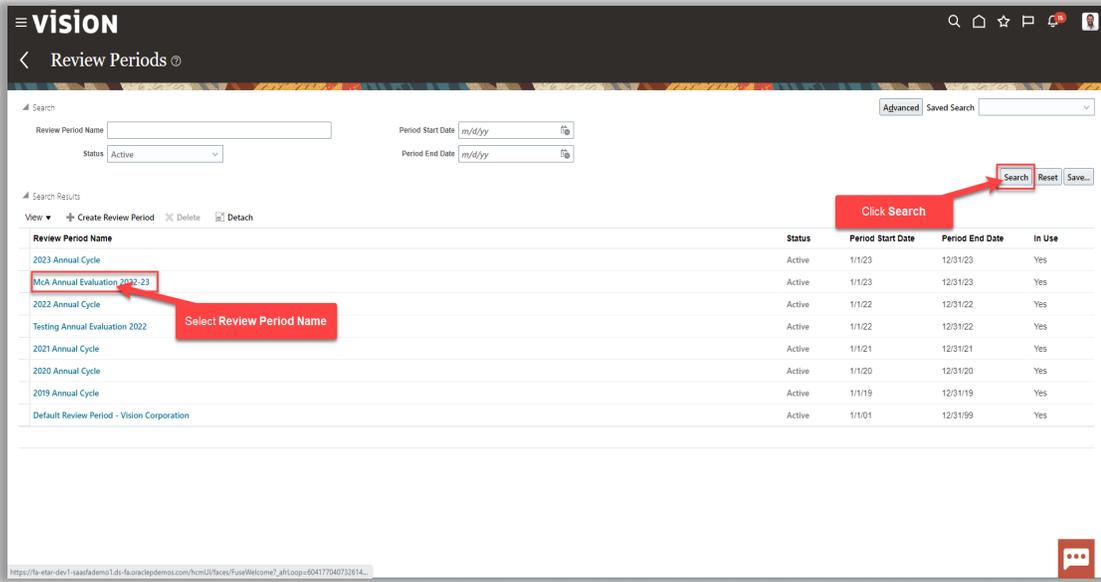
Next, click **Goals**



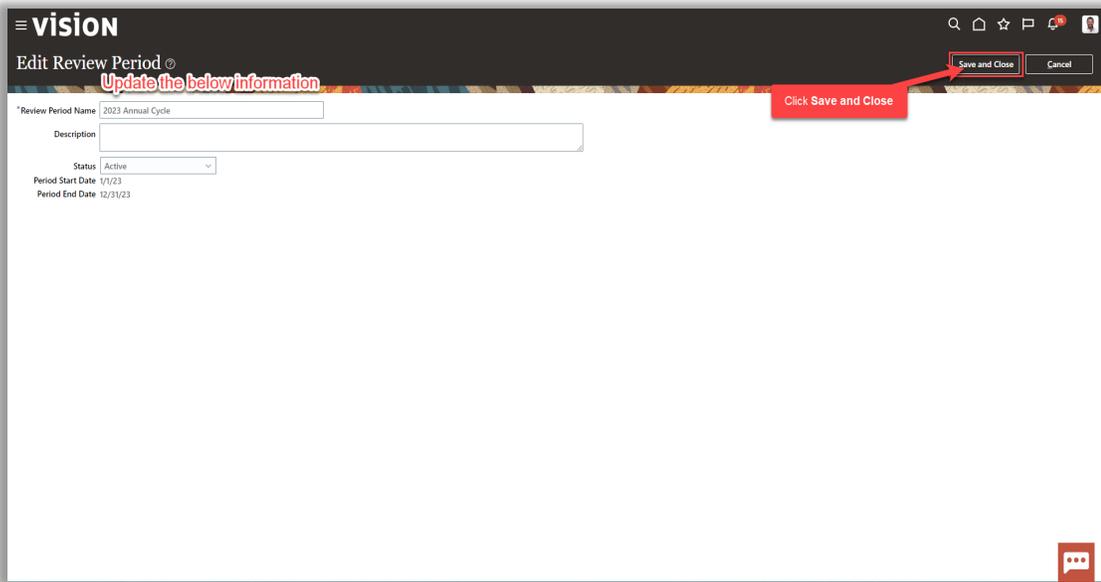
Next, click **Review Periods**



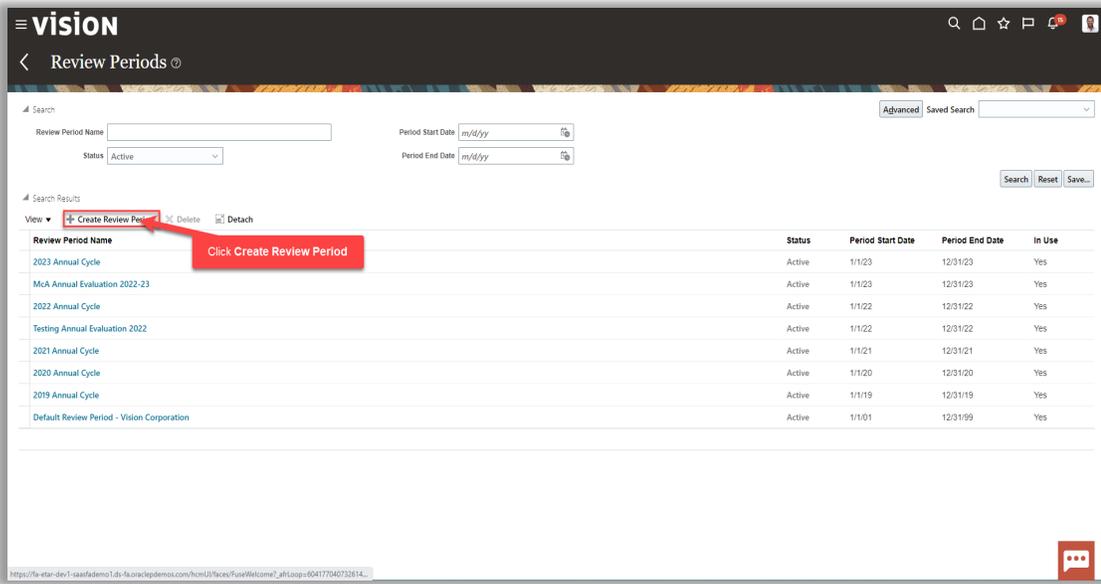
Click **Search** to view the existing **Review Periods**. We can edit an existing review period by selecting the **Review Period Name**



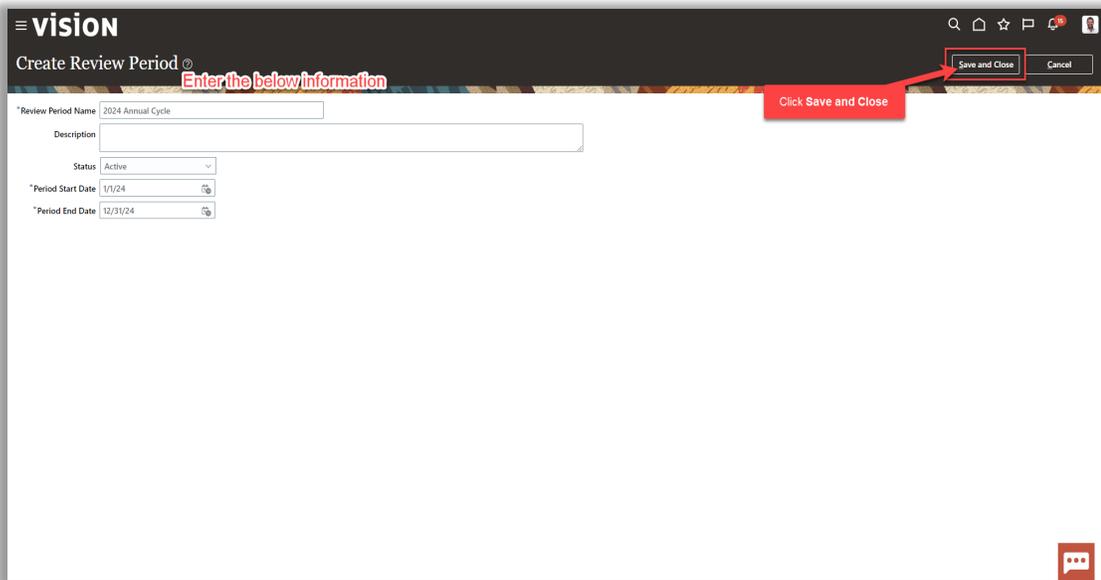
Here we can edit the Review Period Information. Once complete, click **Save and Close** then **OK**



To add a new Review Period, click **Create Review Period**



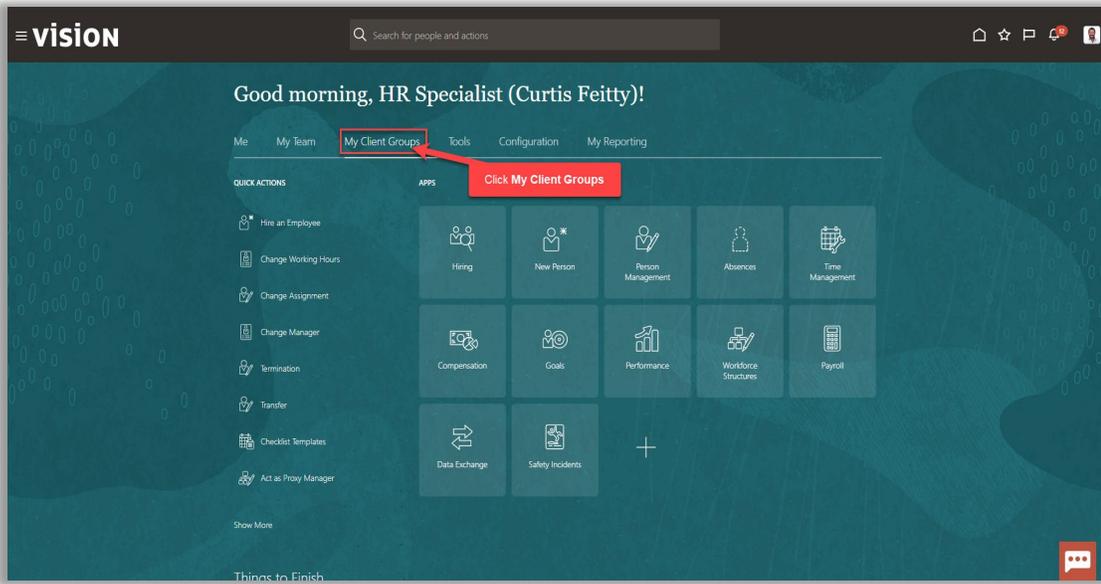
Enter the **Review Period** information and click **Save and Close**, then **Ok**



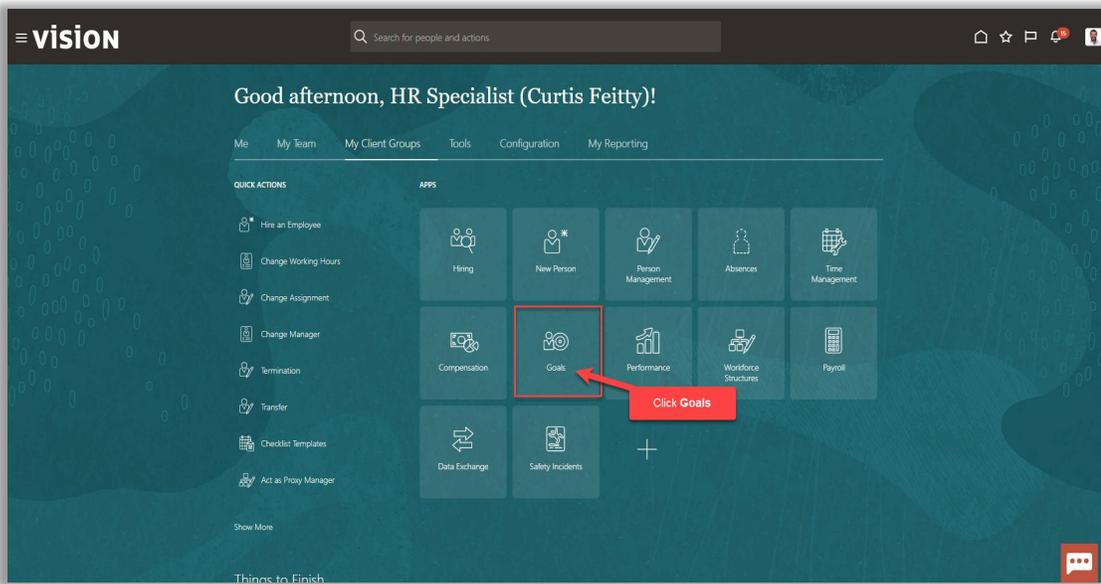
Add Goal Plans

Navigation: Home>My Client Groups>Goals>Review Period>Goal Plans>Add or View Info>Save and Close>Ok

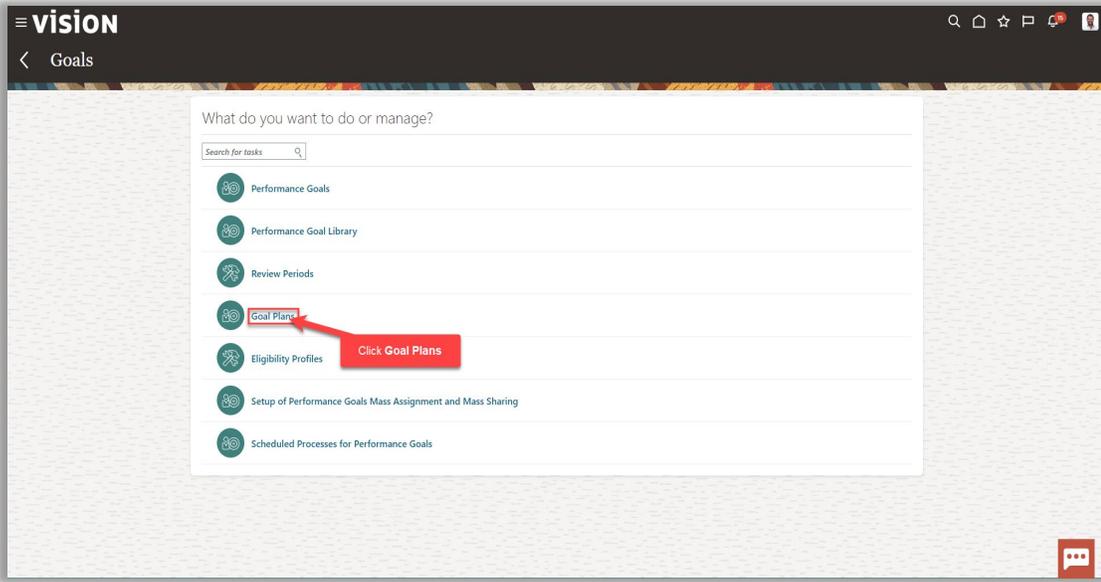
From the home screen, click **My Client Groups**



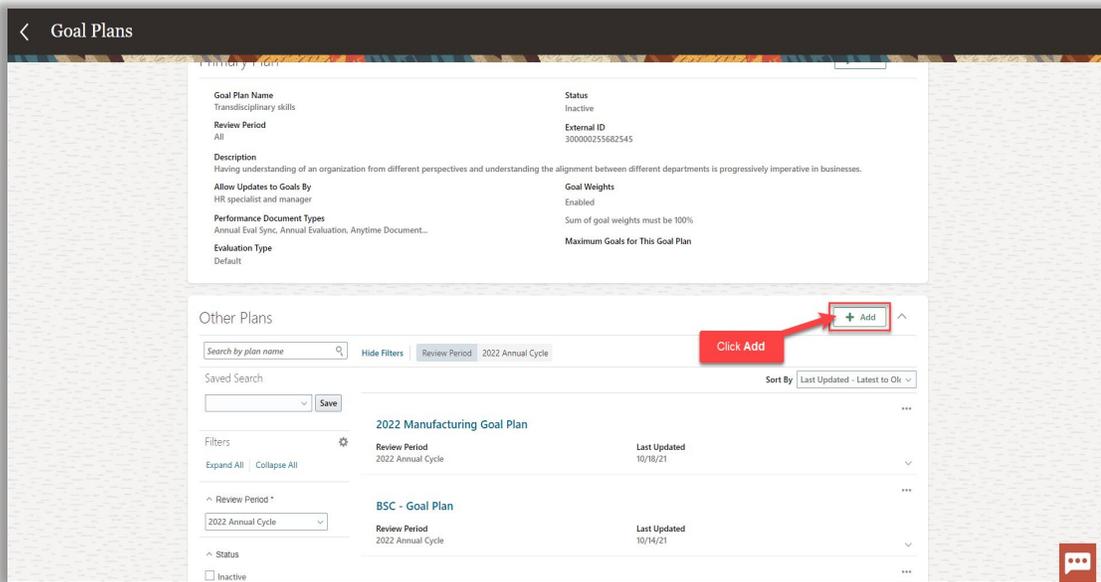
Next, click **Goals**



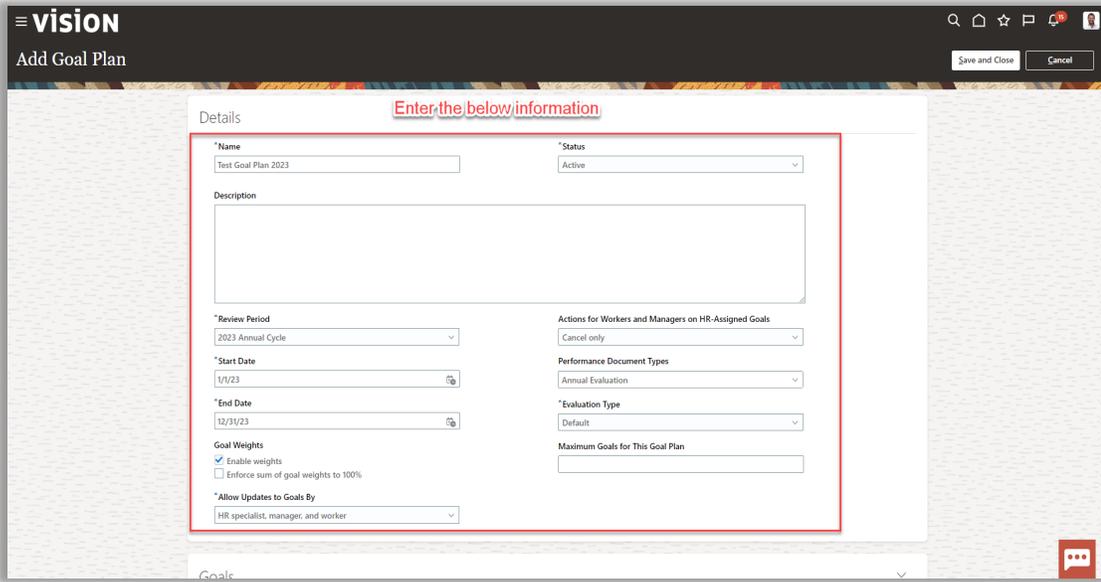
Next, click **Goal Plans**



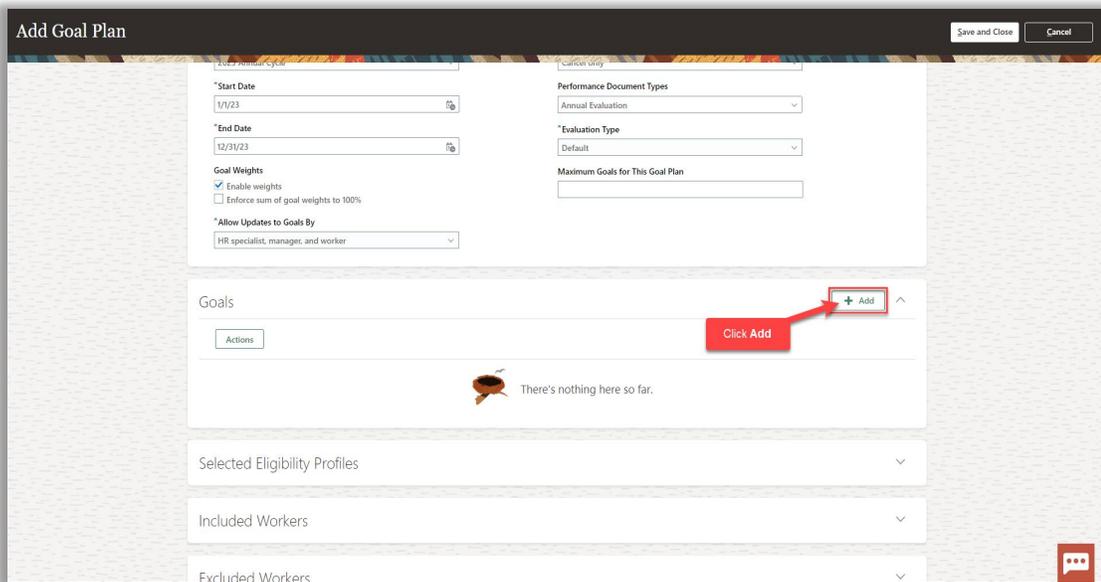
Here we can view the existing **Goal Plans** for the **Review Periods**. To add a **Goal Plan**, click **Add**



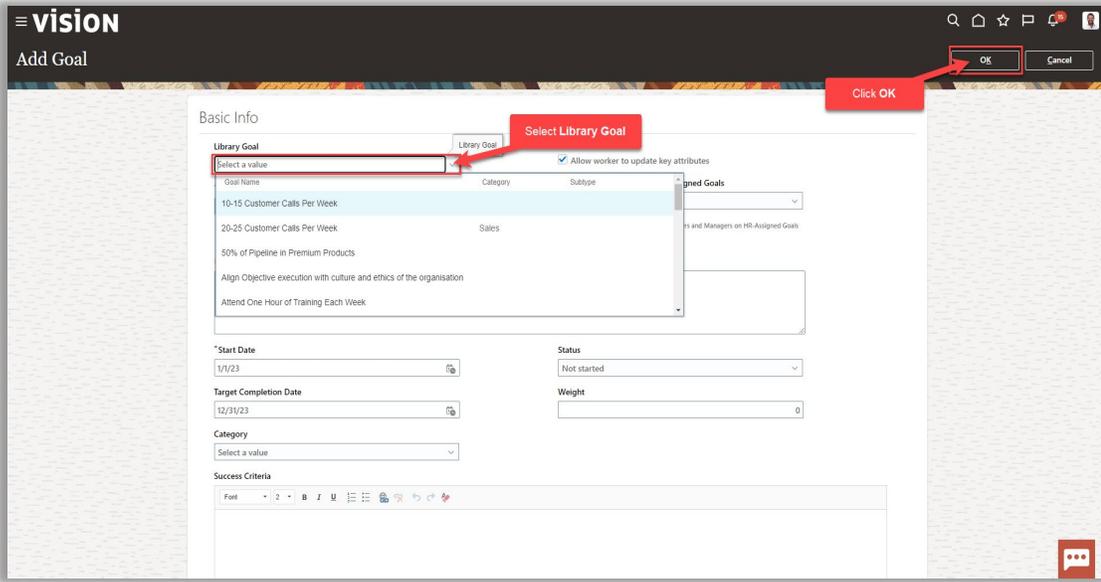
Enter the **Details**



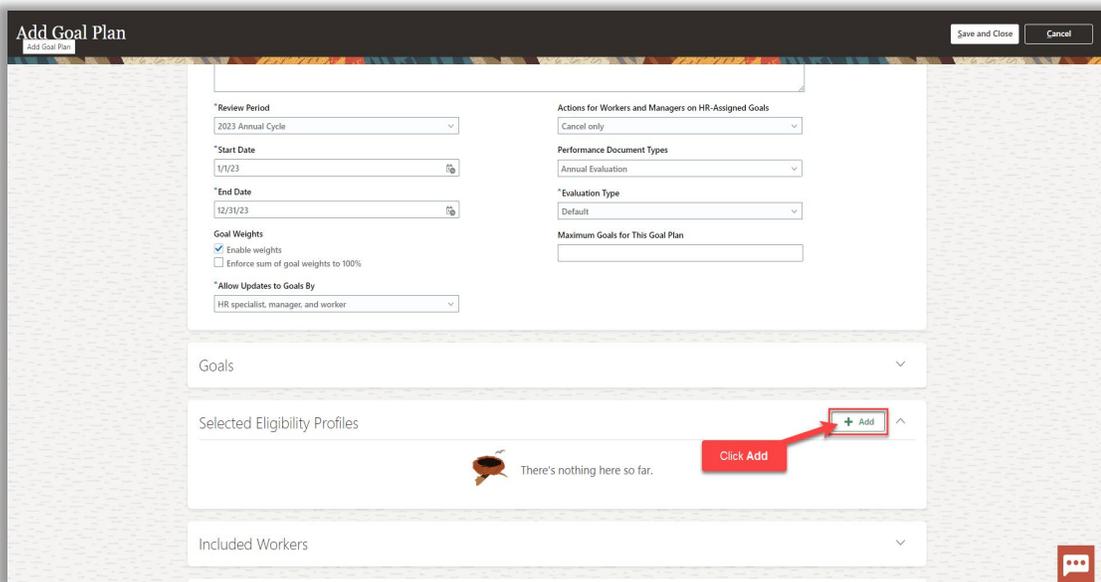
Next, we can add the **Goals** from the **Goal Library**. Click **Add**



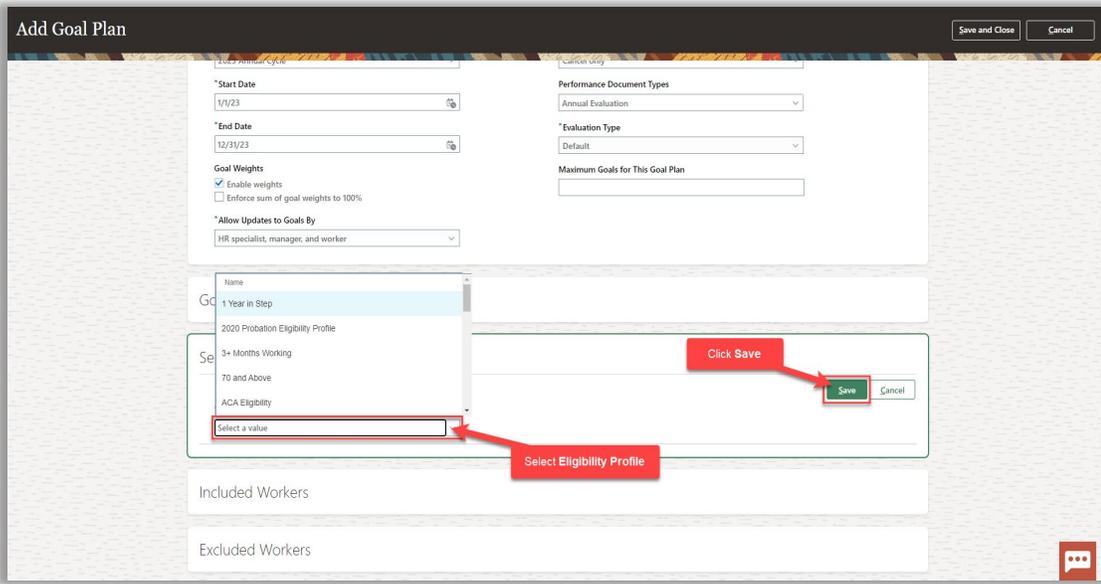
Here we can select a Goal from the **Goal Library** or Enter the information to create a new Goal. From the dropdown, select the **Library Goal**. Click **OK**



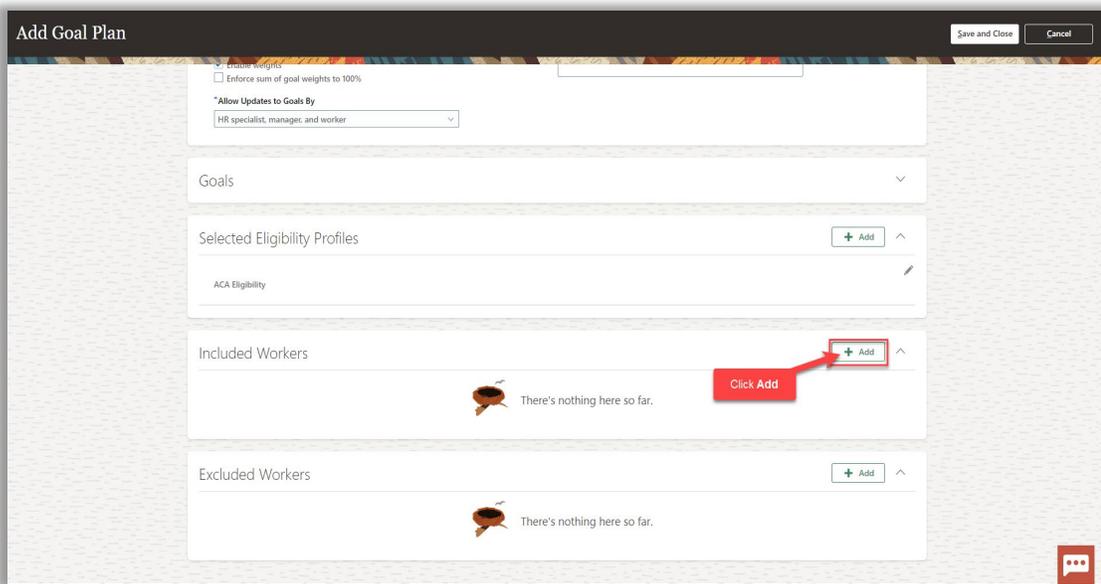
Next, scroll down to the **Selected Eligibility Profiles**. To add an **Eligibility Profile**, click **Add**



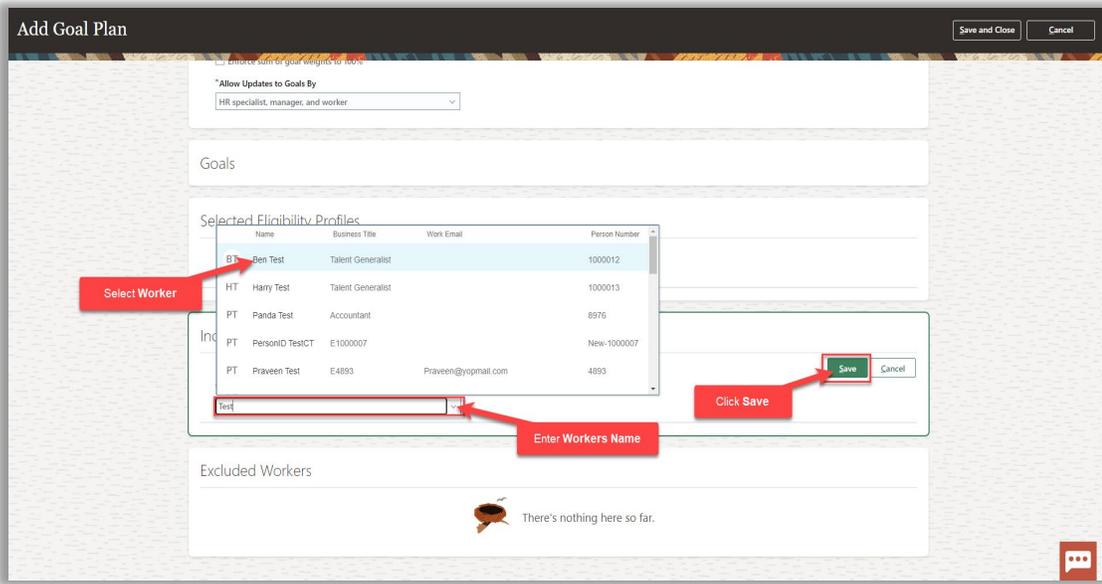
Select the **Eligibility Profile** from the dropdown and click **Save**



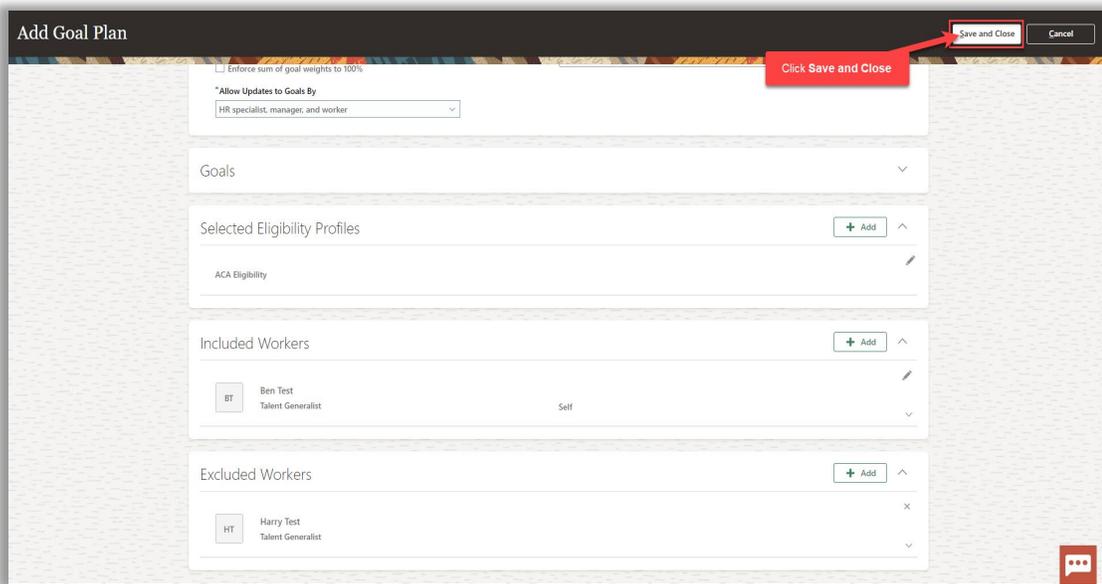
In the next two sections, we can **Include or Exclude Workers**. To add a worker to Include, click **Add**



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



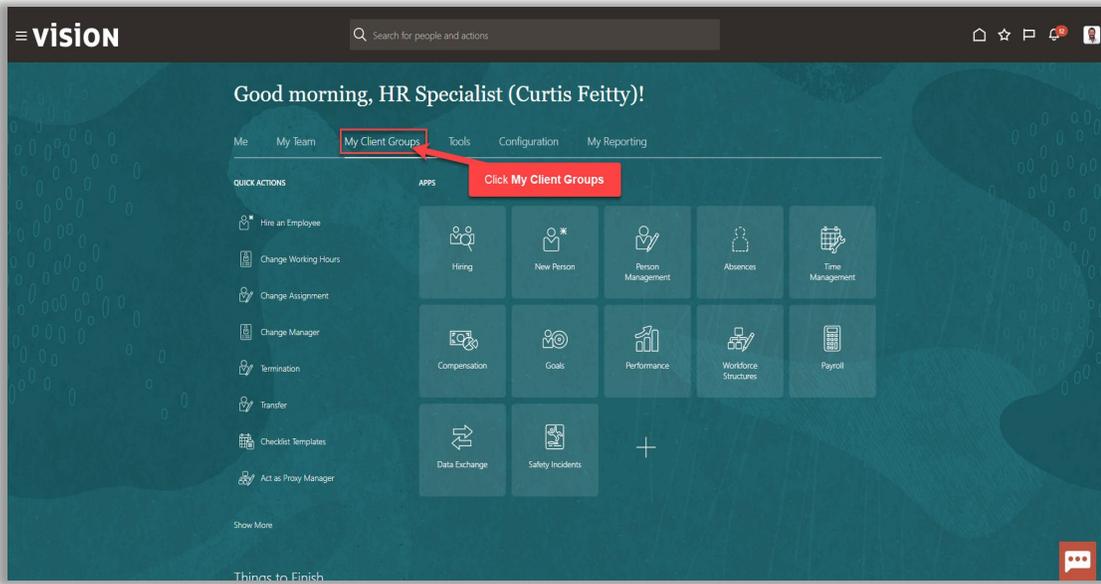
We can follow this same process to add **Excluded Workers**. Once complete, click **Save and Close**



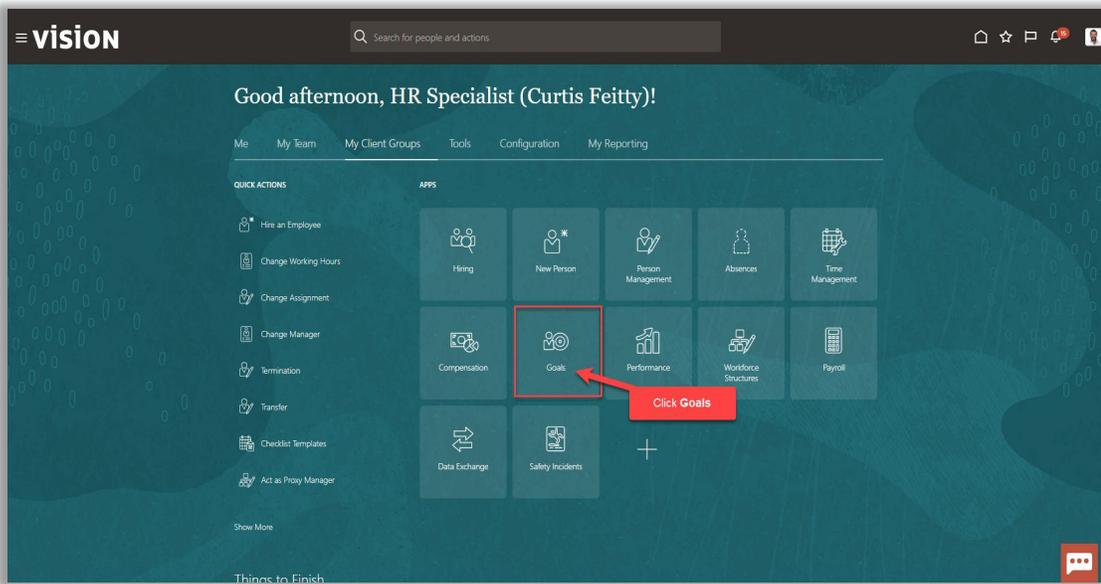
Edit Goal Plan

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

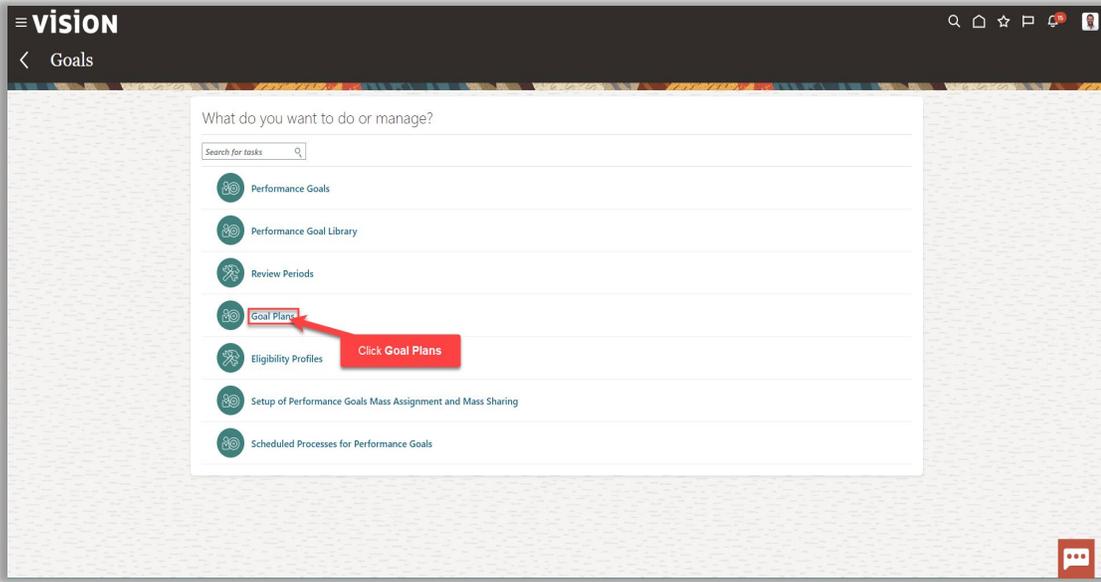
From the home screen, click **My Client Groups**



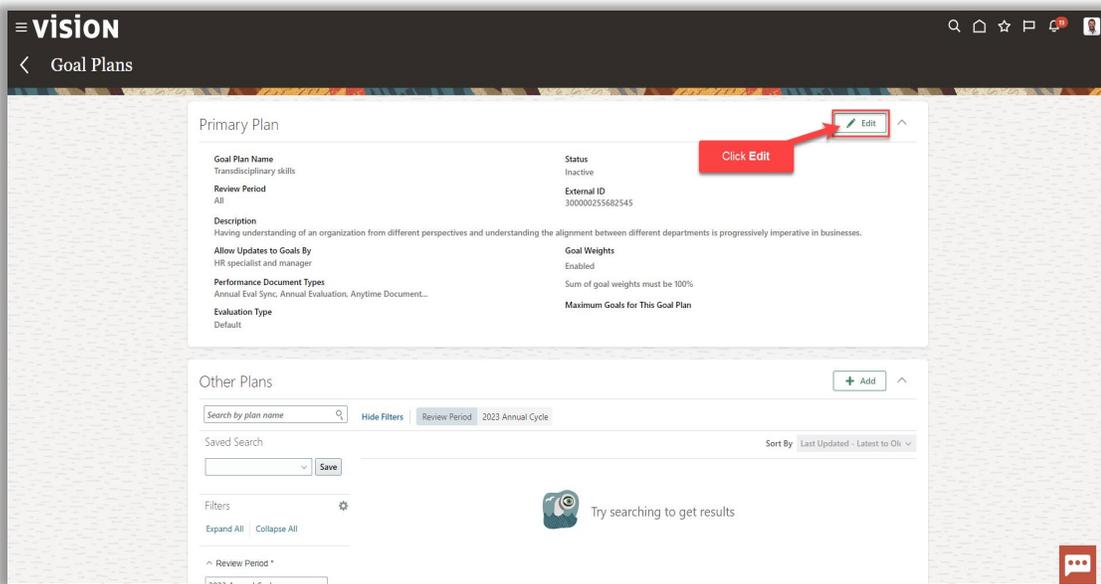
Next, click **Goals**



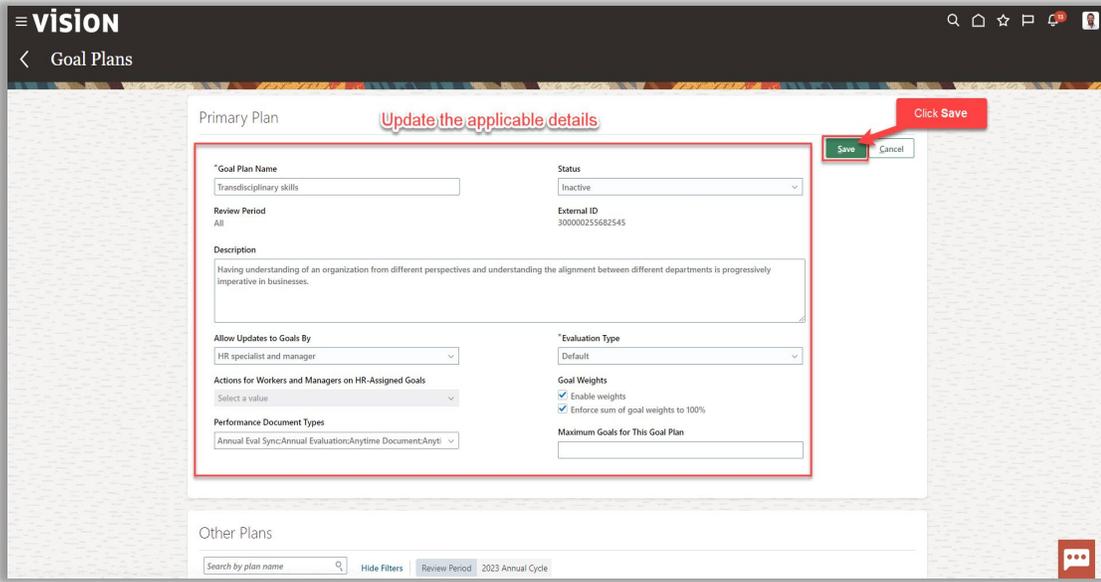
Next, click **Goal Plans**



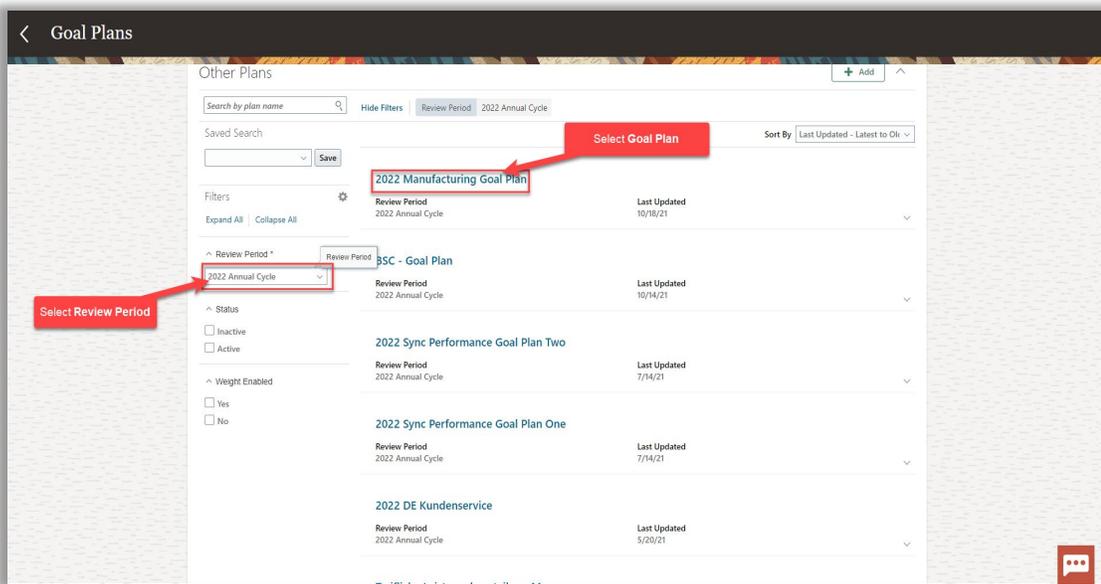
Here we can view the existing **Goal Plans** for the **Review Periods**. To edit the **Primary Goal Plan**, click **Edit**



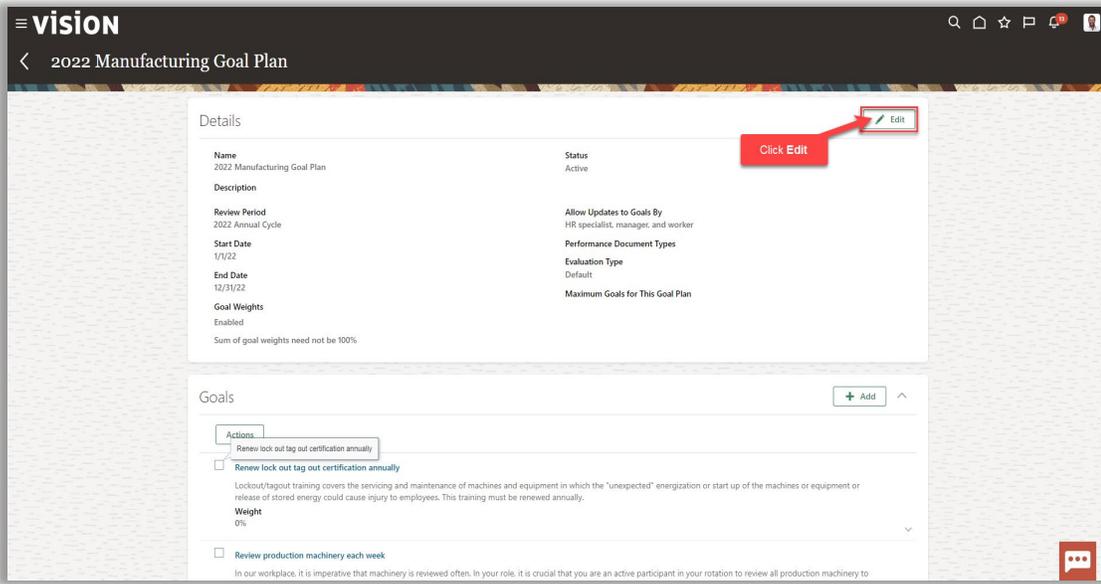
Edit the applicable details and click **Save**



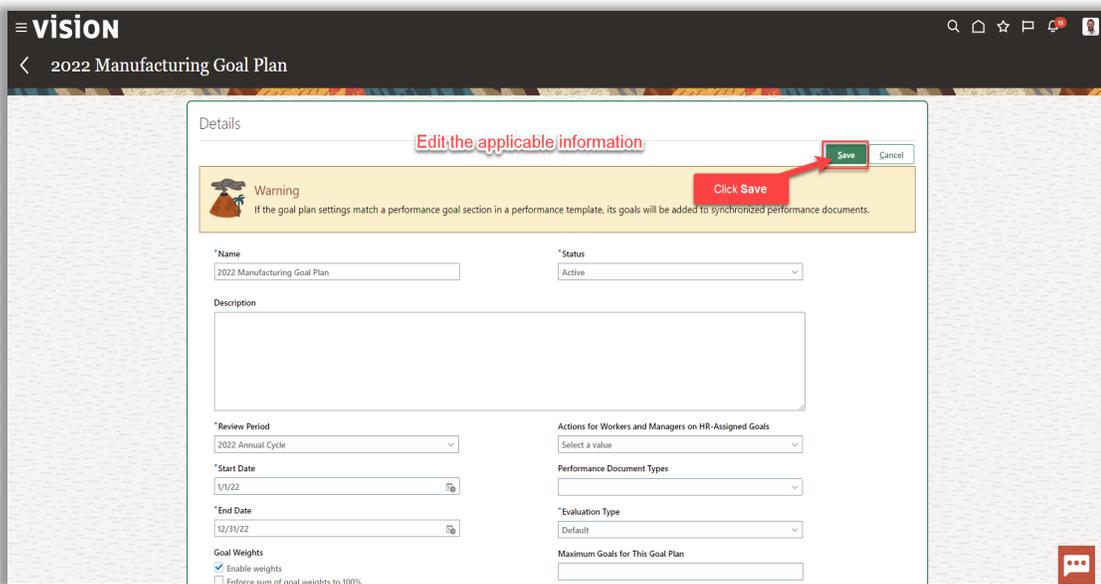
To Edit **Other Plans**, select the **Review Period** and select the **Goal Plan** we wish to Edit



Click **Edit** to edit the **Plan Details**



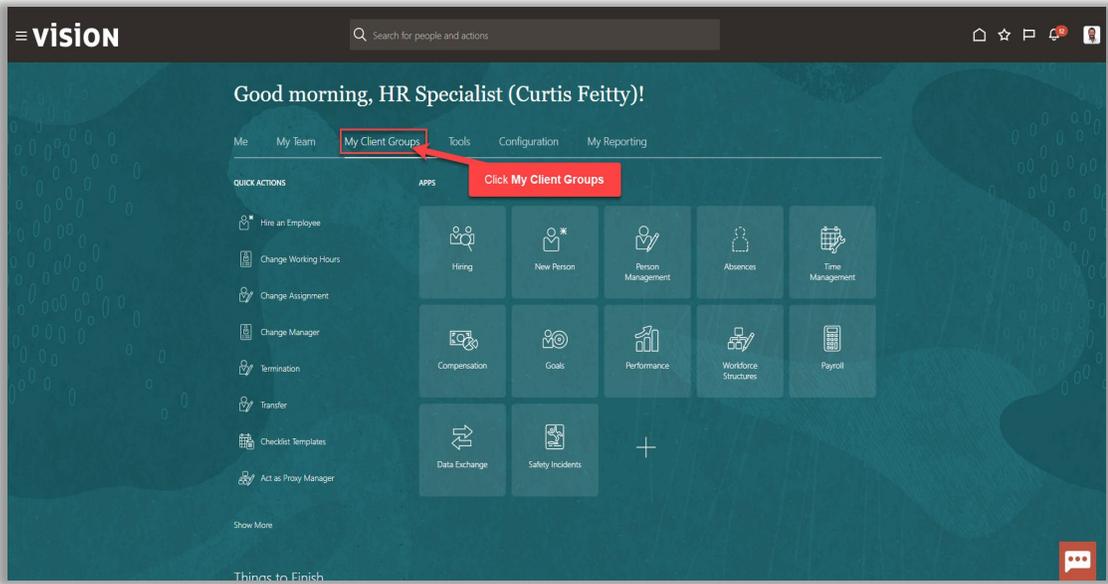
Edit the applicable details and click **Save**



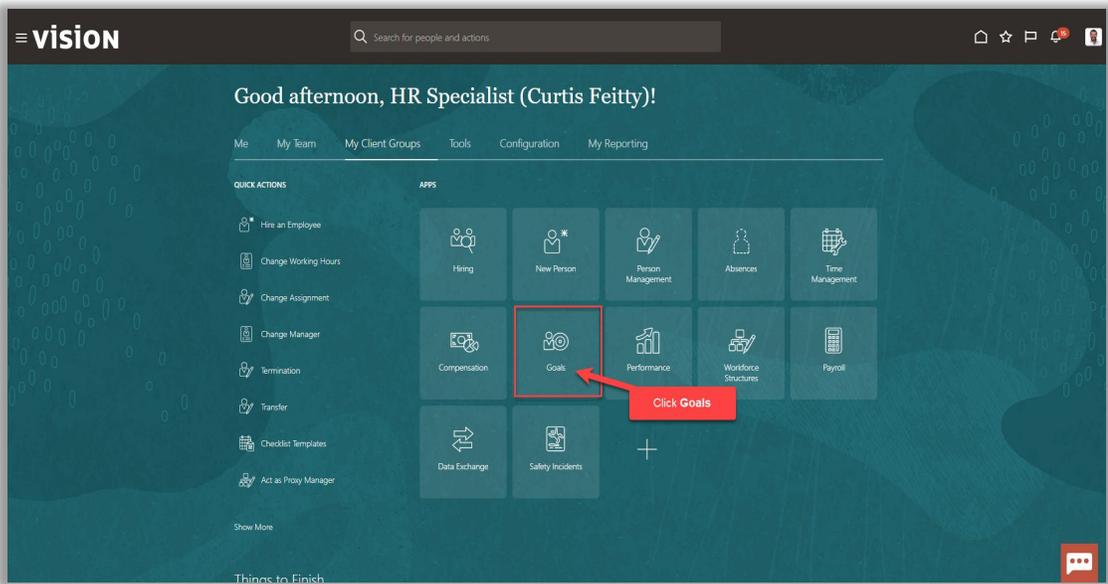
End Goal Plan

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

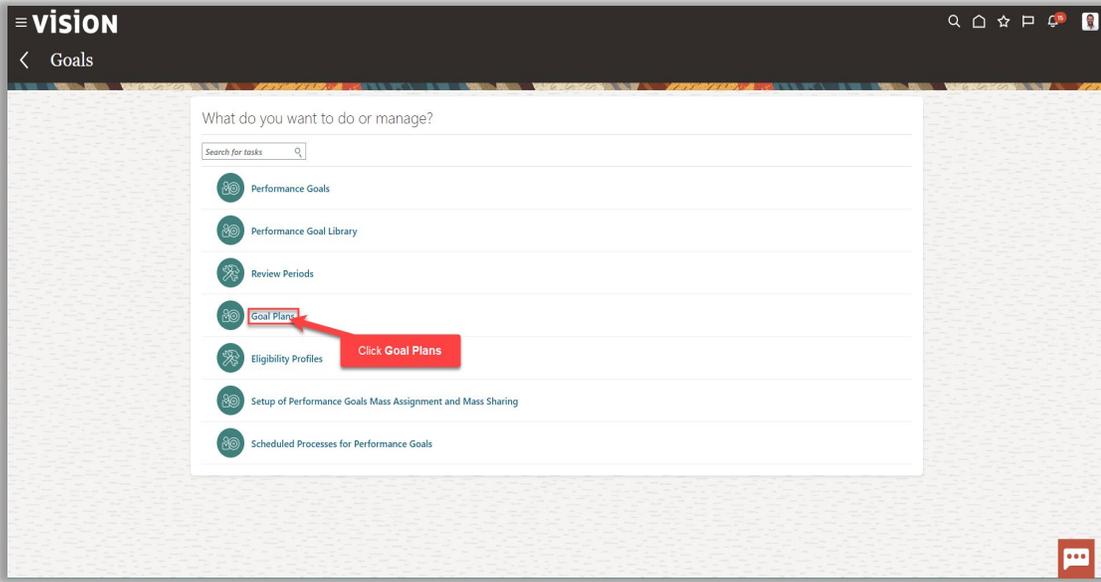
From the home screen, click **My Client Groups**



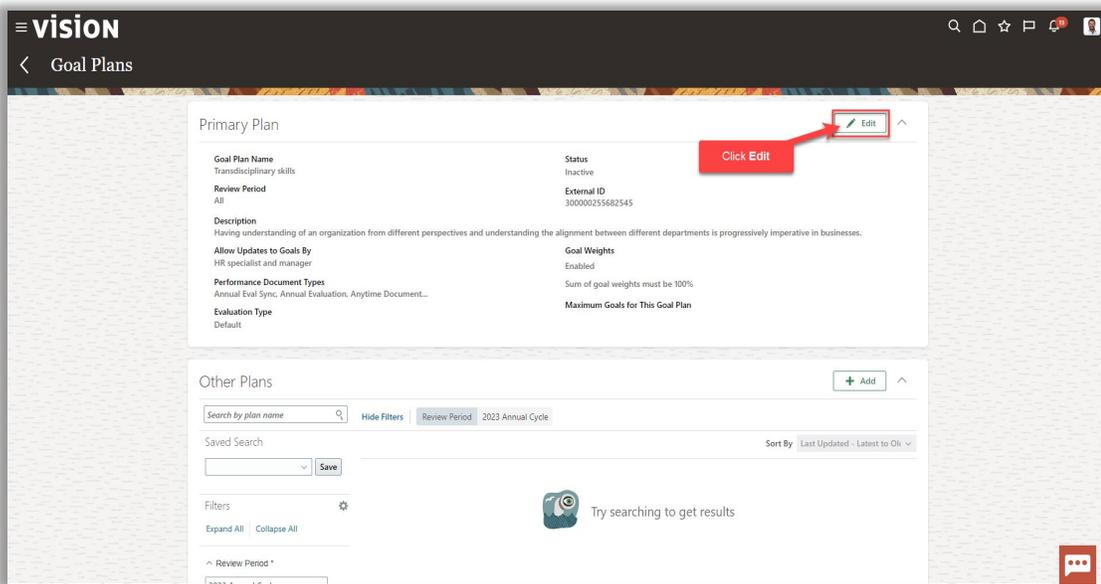
Next, click **Goals**



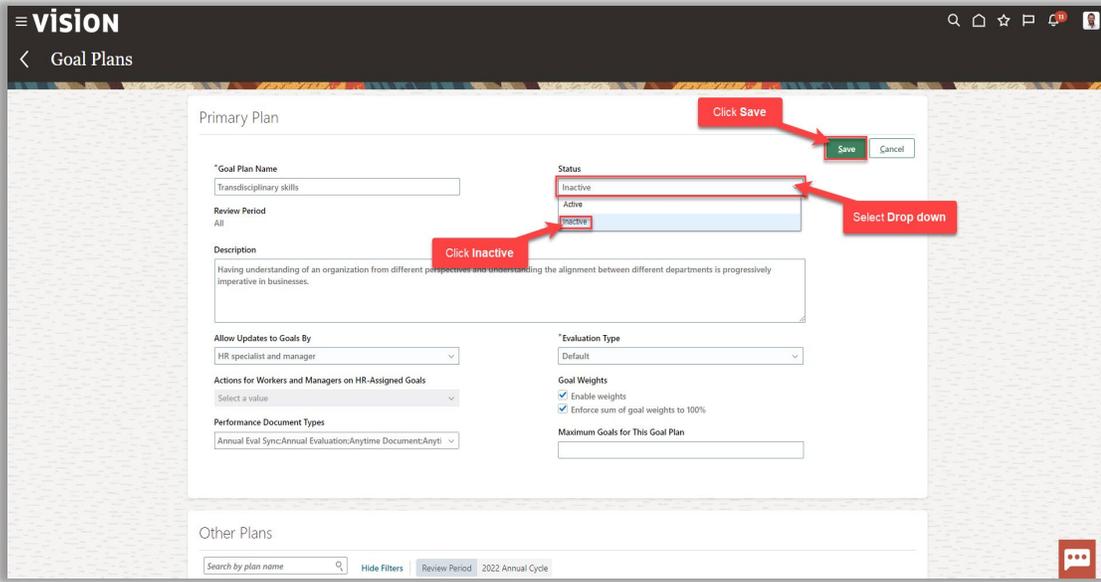
Next, click **Goal Plans**



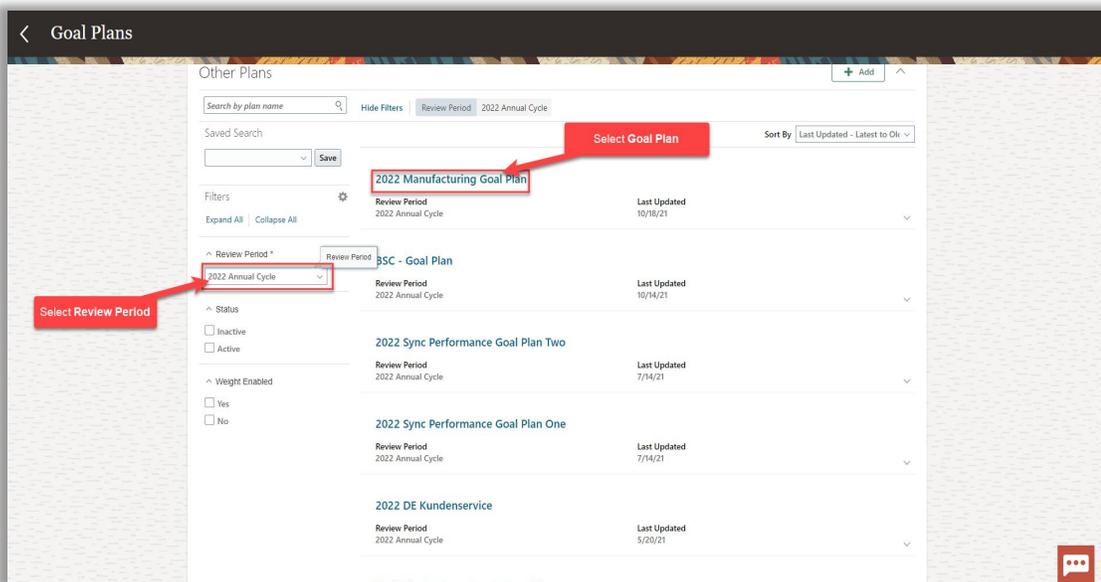
Here we can view the existing **Goal Plans** for the **Review Periods**. To End the **Primary Goal Plan**, click **Edit**



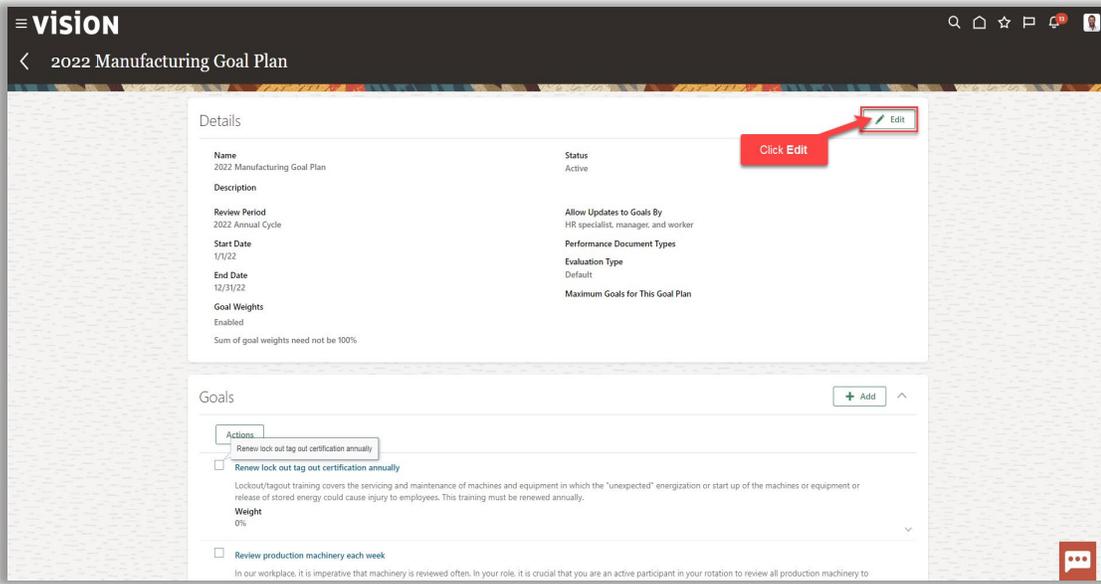
Next, from the **Status** drop down, click **Inactive** and click **Save**



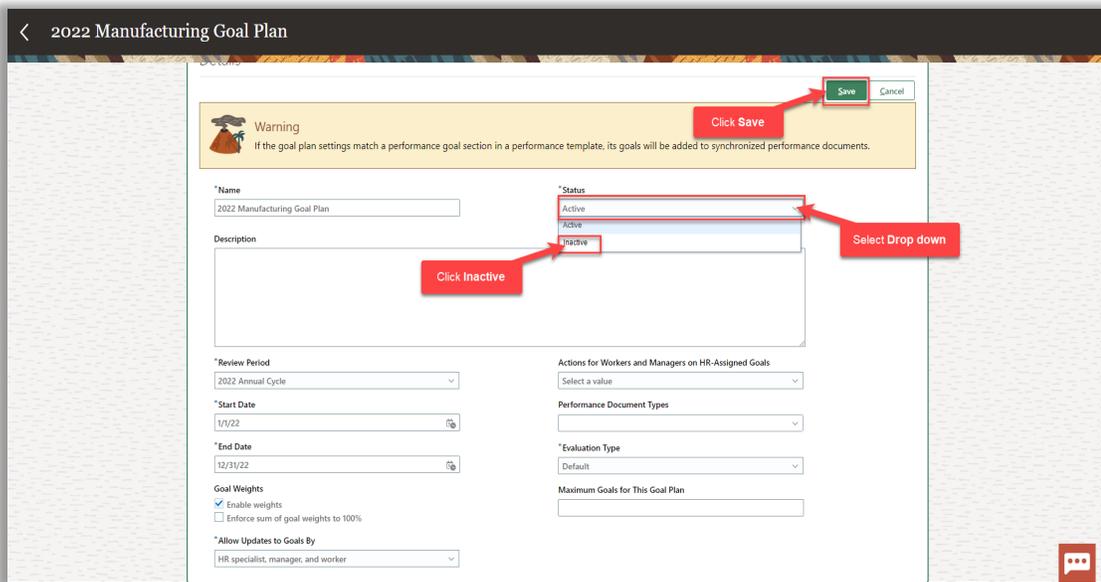
To End Other Plans, select the Review Period and select the Goal Plan we wish to End



Click Edit to edit the Plan Details



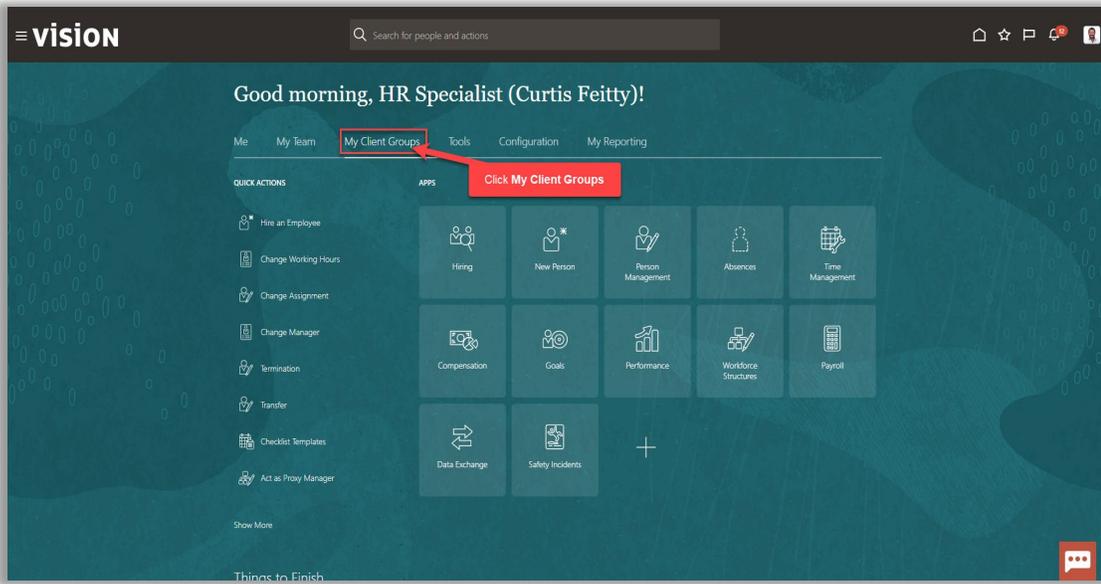
Lastly, from the **Status** drop down, click **Inactive** and click **Save**



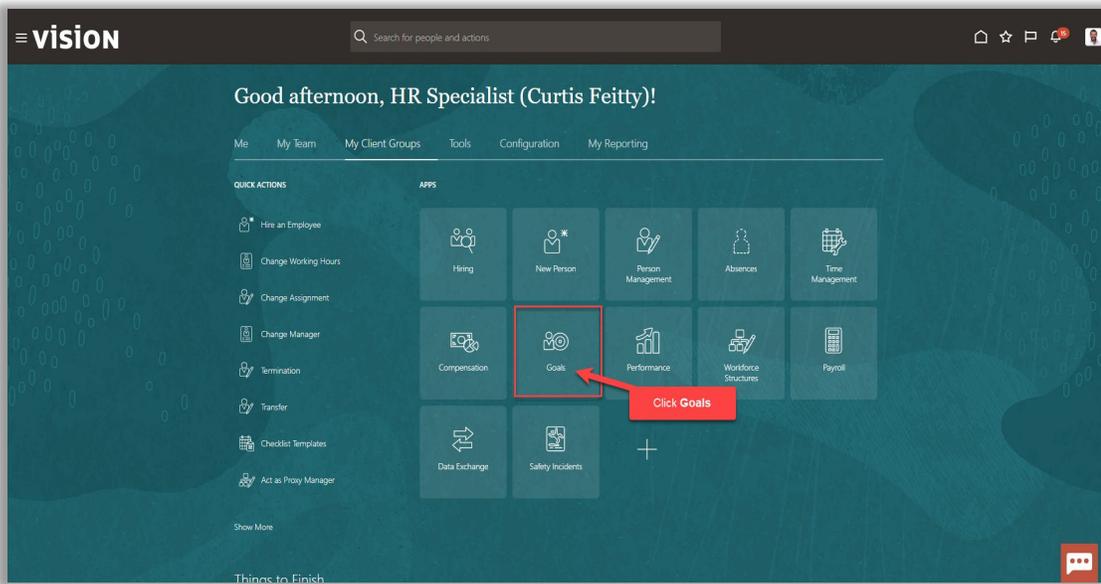
Manage Scheduled Processes

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

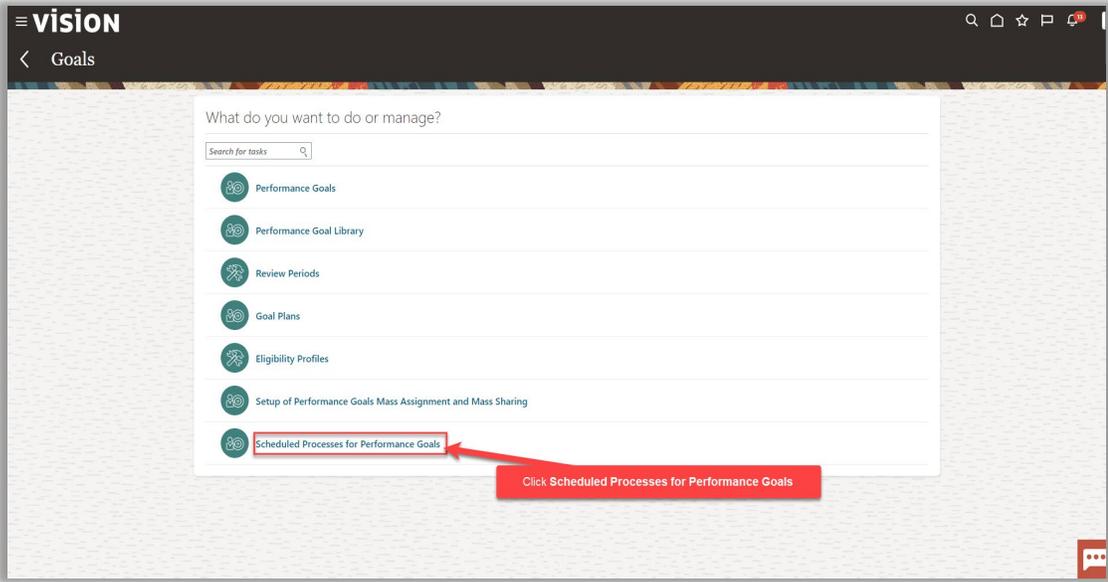
From the home screen, click **My Client Groups**



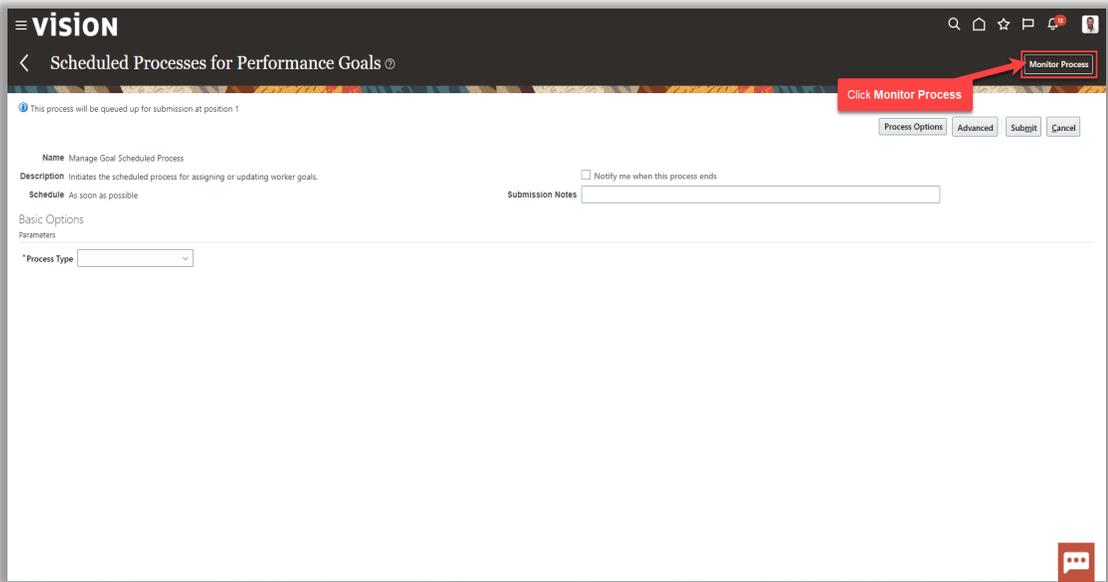
Next, click **Goals**



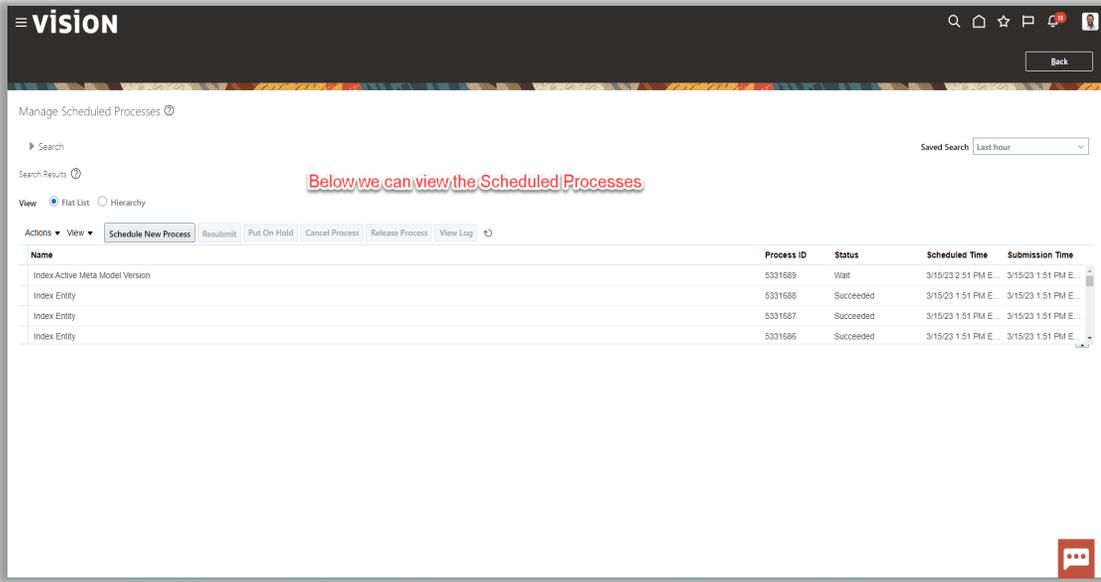
Next, click **Scheduled Processes for Performance Goals**



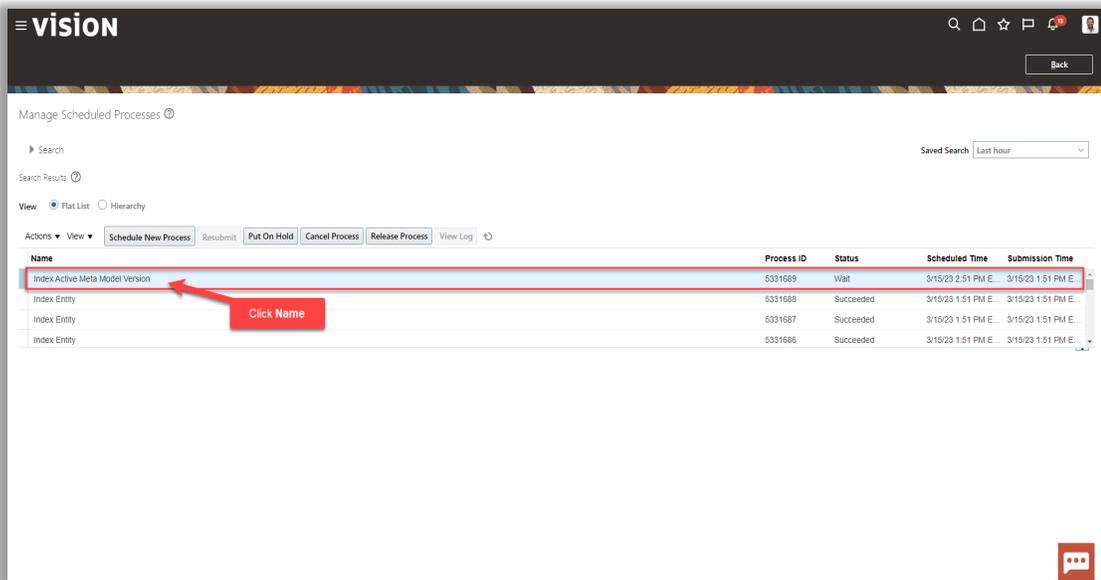
Here we can view the existing **Scheduled Processes**. Click **Monitor Process** to view the status of the current **Scheduled Process**



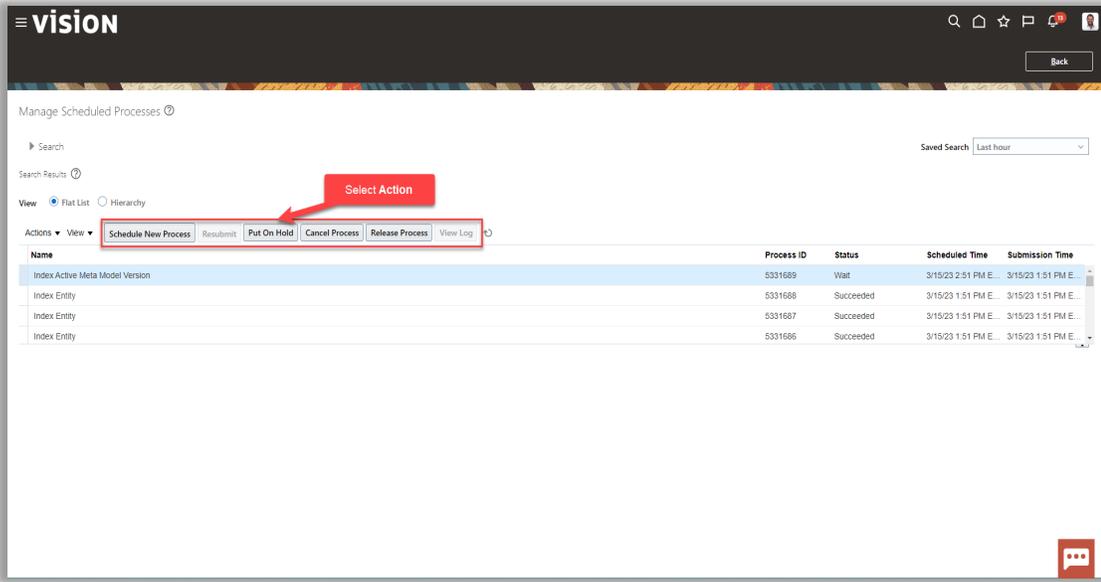
Here we can view the status of the **Scheduled Processes**



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



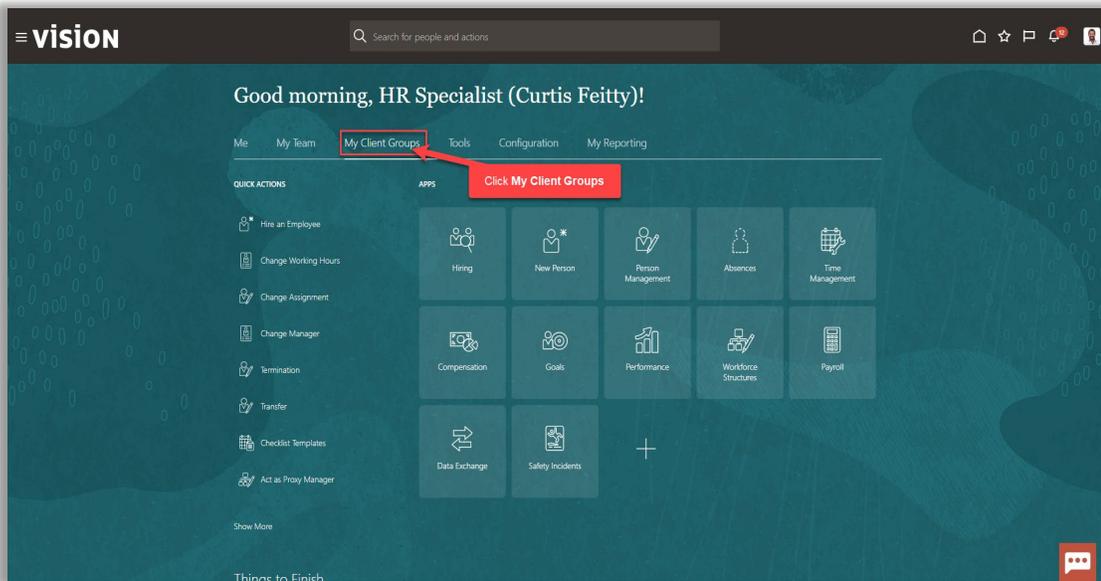
Next, select the applicable **Action** for the **Scheduled Process**



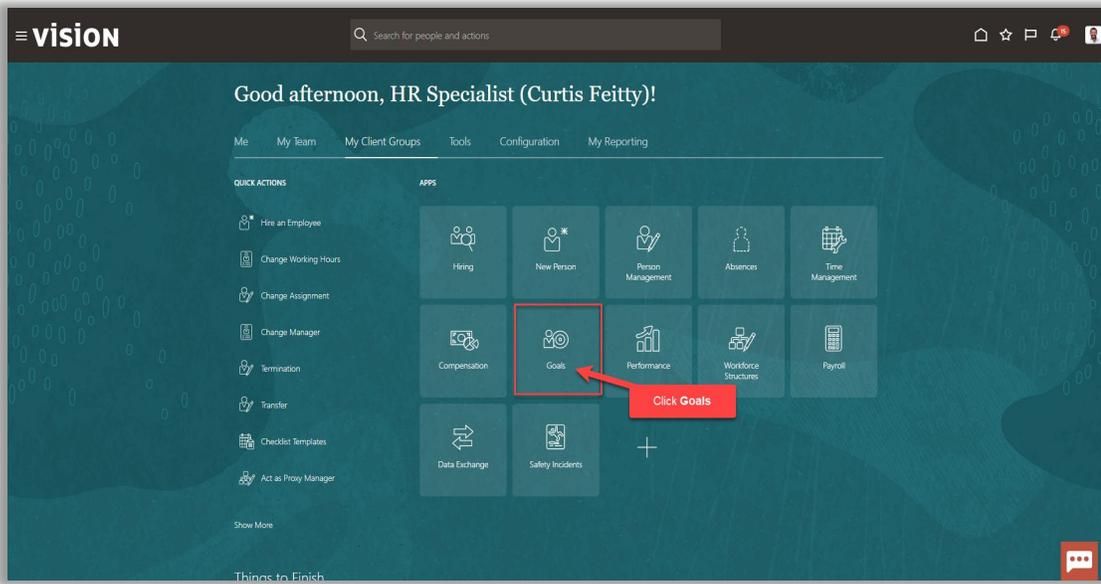
Manage Eligibility Profiles

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

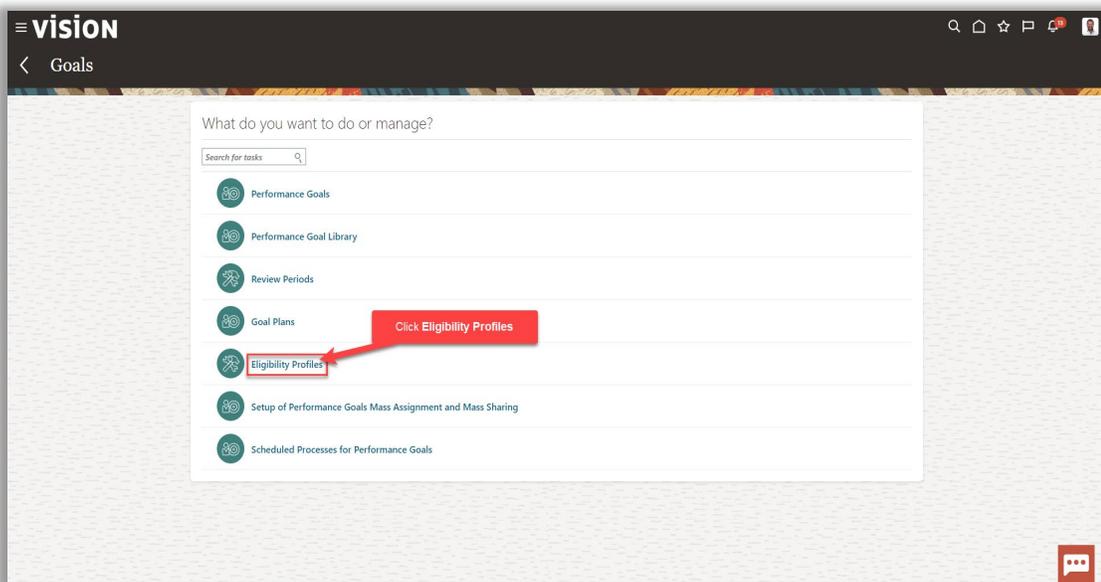
From the home screen, click **My Client Groups**



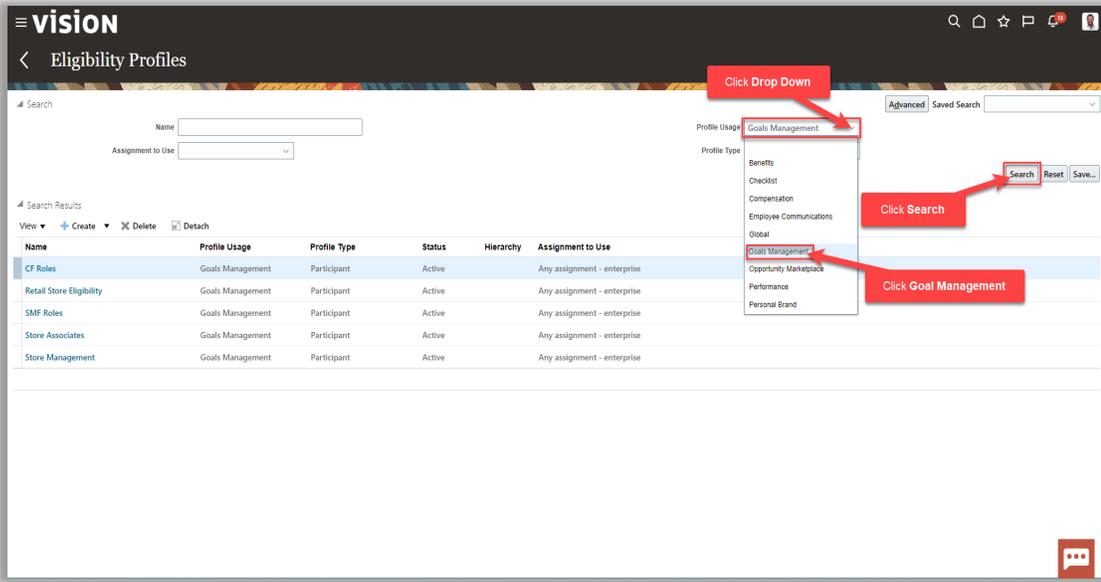
Next, click **Goals**



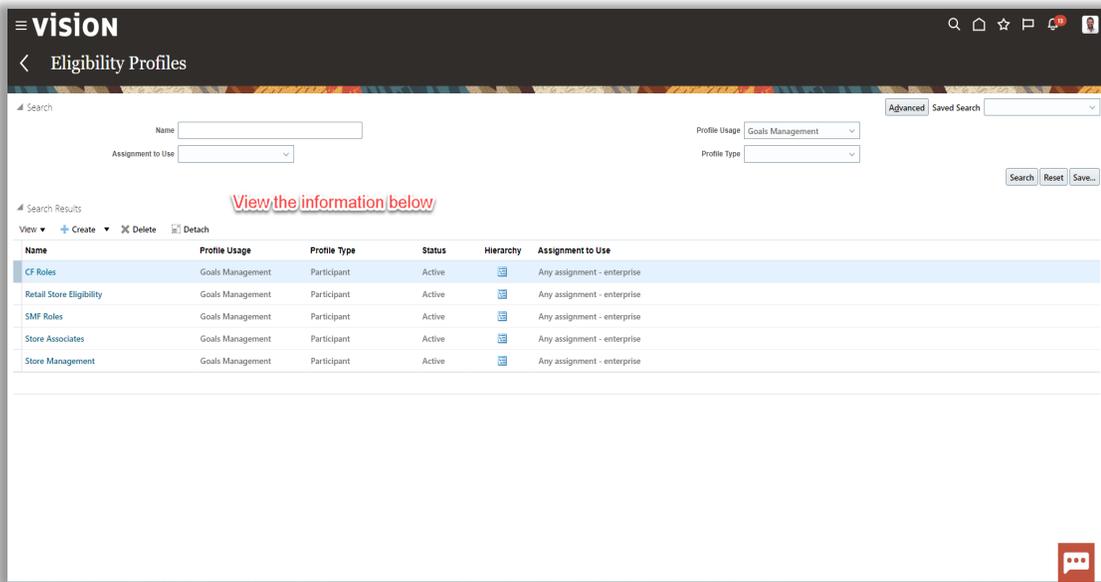
Next, click **Eligibility Profiles**



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



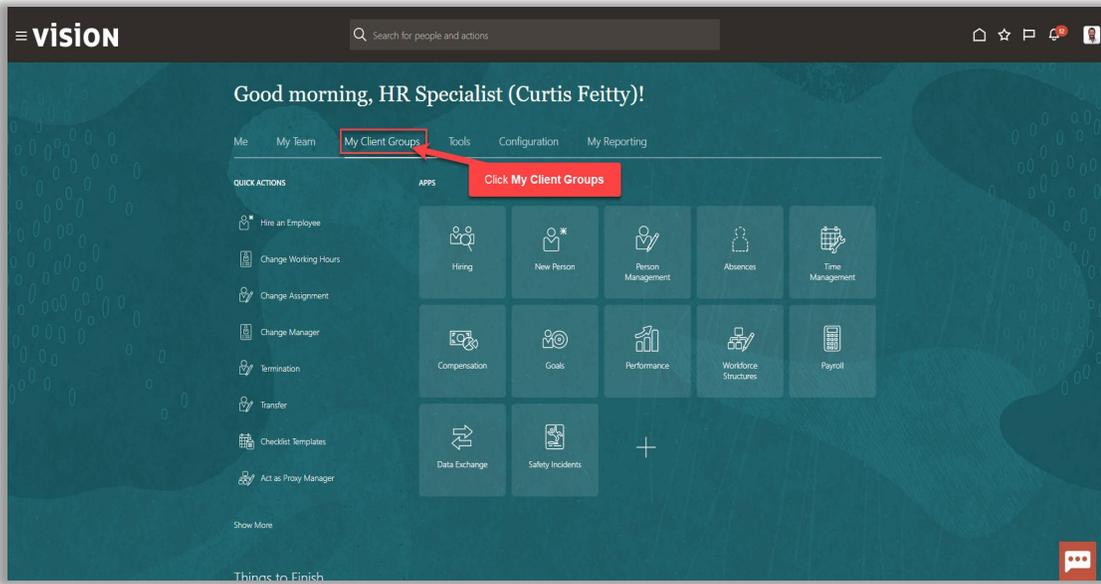
Here we can view the existing Eligibility Profiles



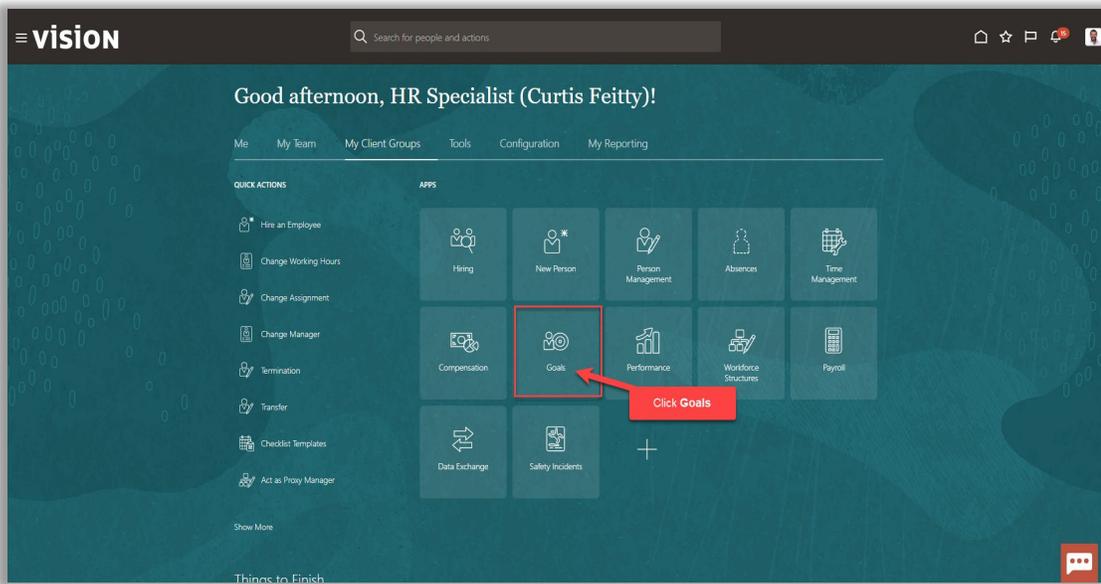
Create Eligibility Profiles

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

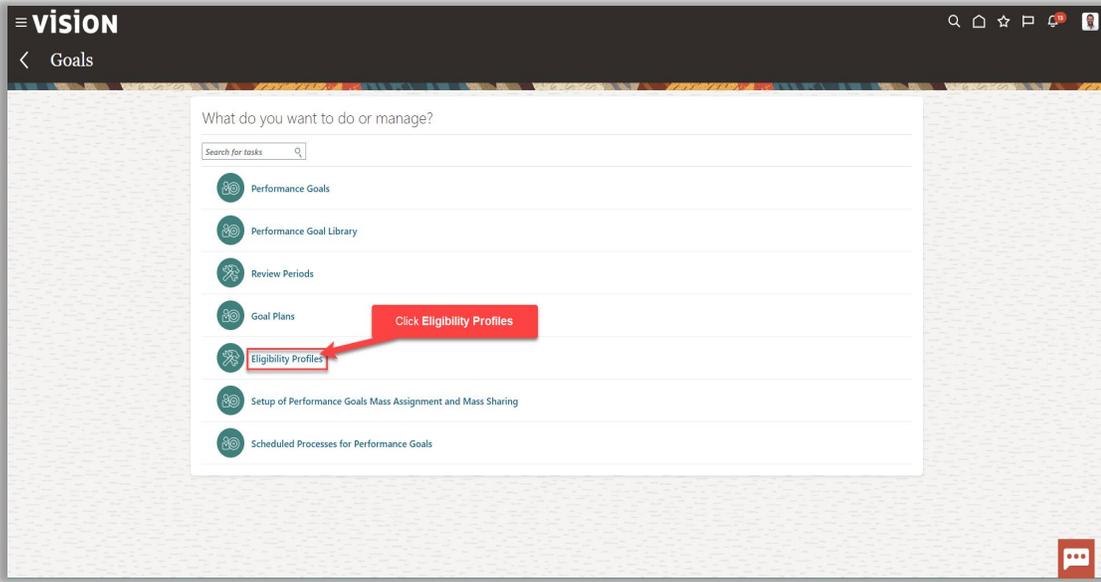
From the home screen, click **My Client Groups**



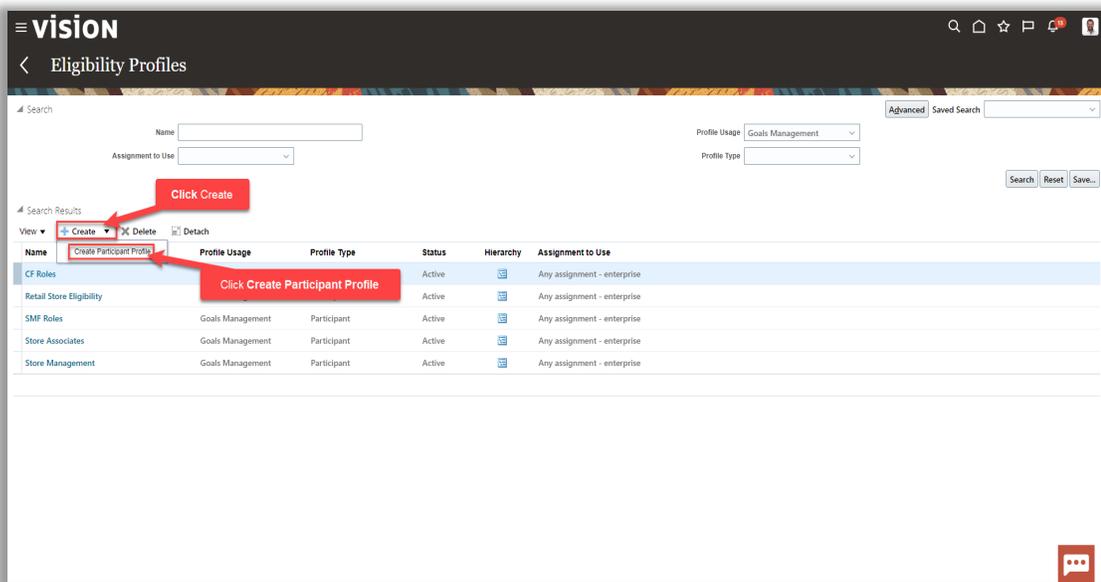
Next, click **Goals**



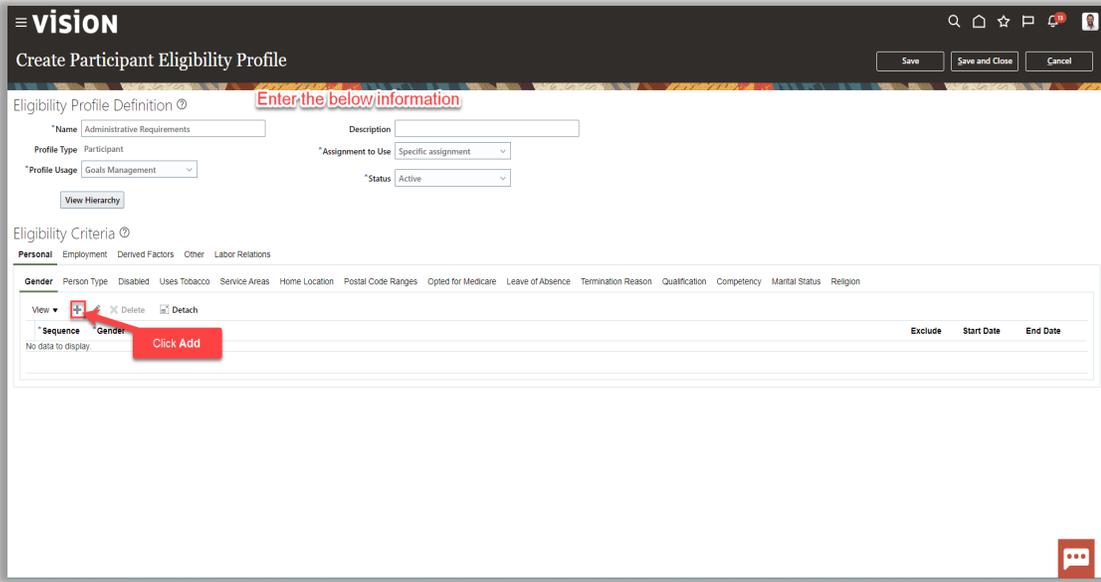
Next, click **Eligibility Profiles**



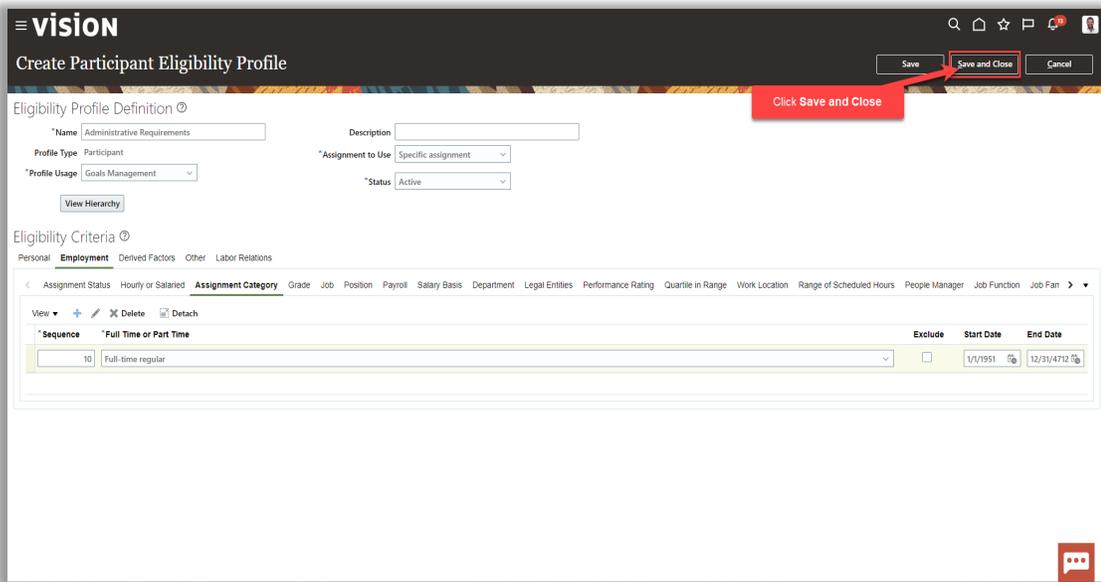
Click **Create** then **Create Participant Profile**



Enter the **Eligibility Profile Definition** and add the **Eligibility Criteria**



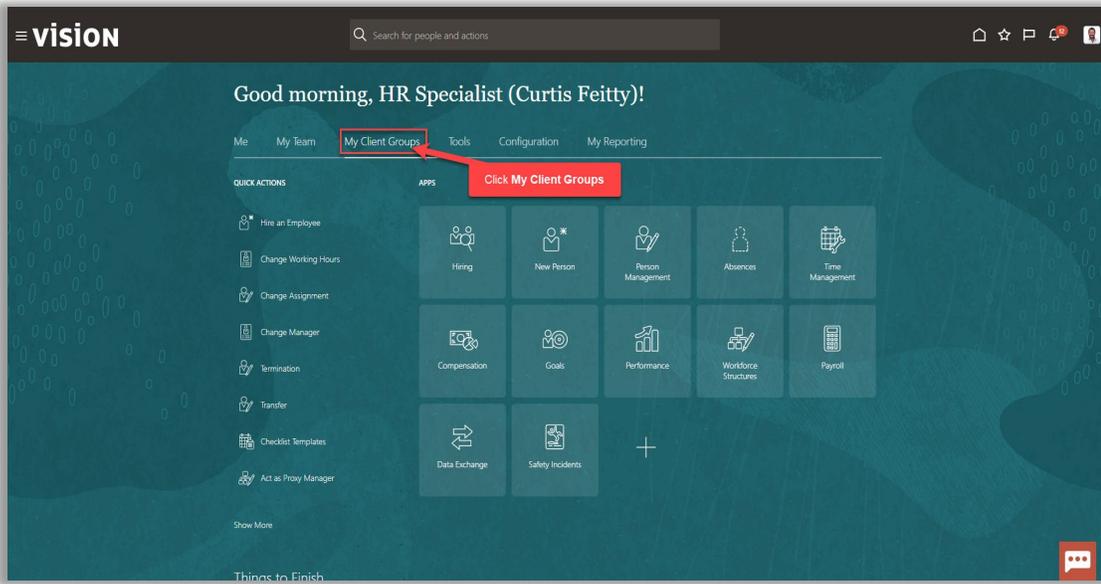
Click Save and Close



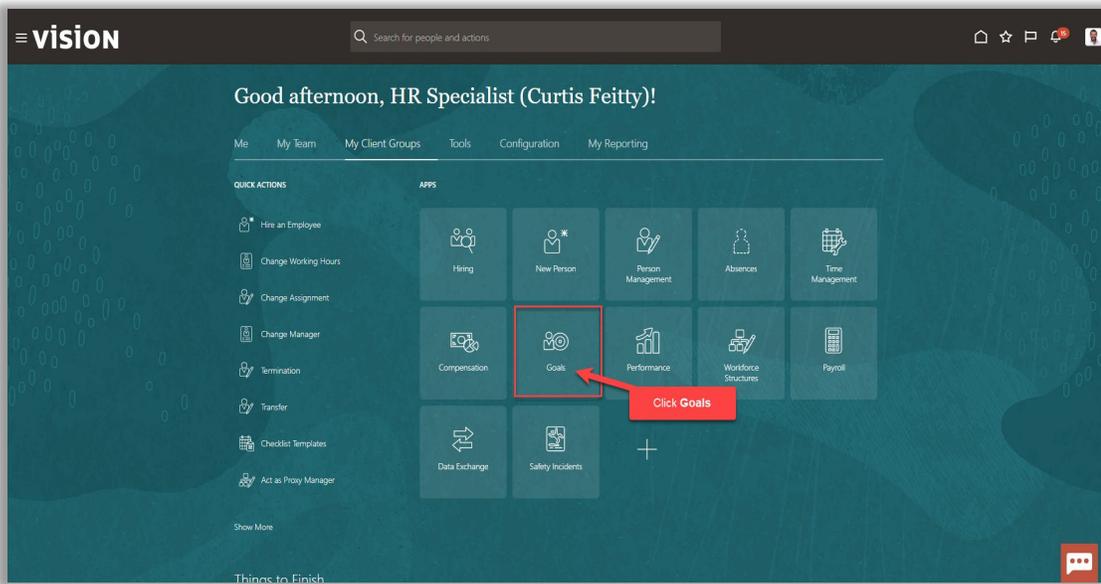
Edit Eligibility Profiles

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

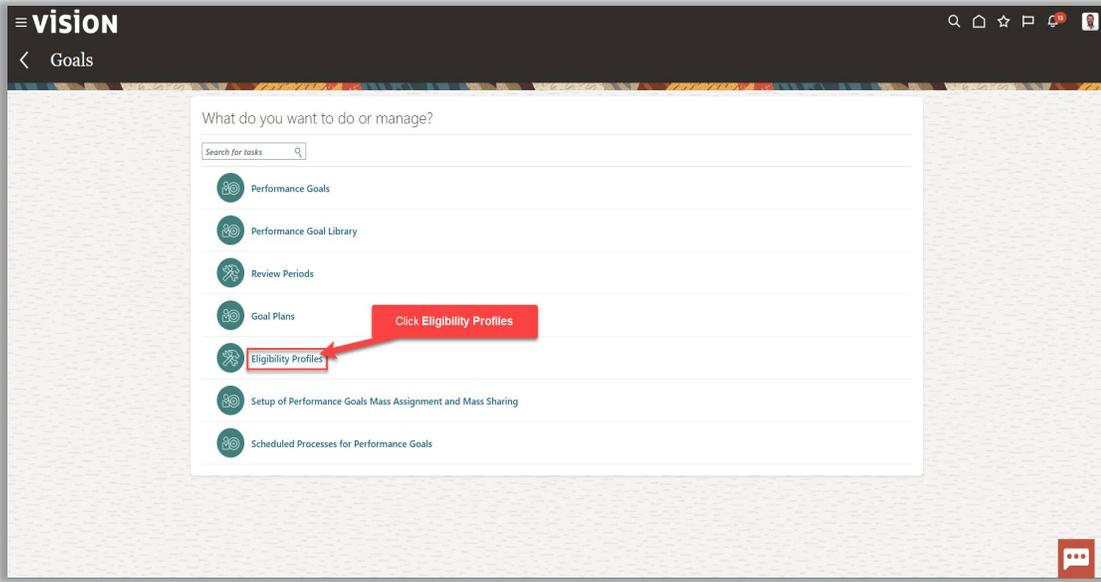
From the home screen, click **My Client Groups**



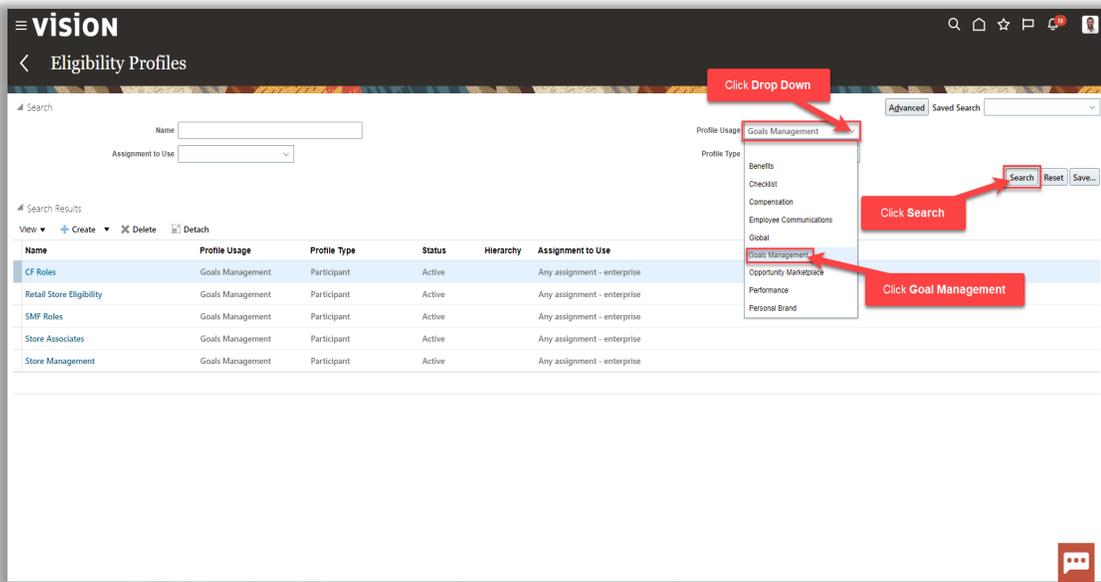
Next, click **Goals**



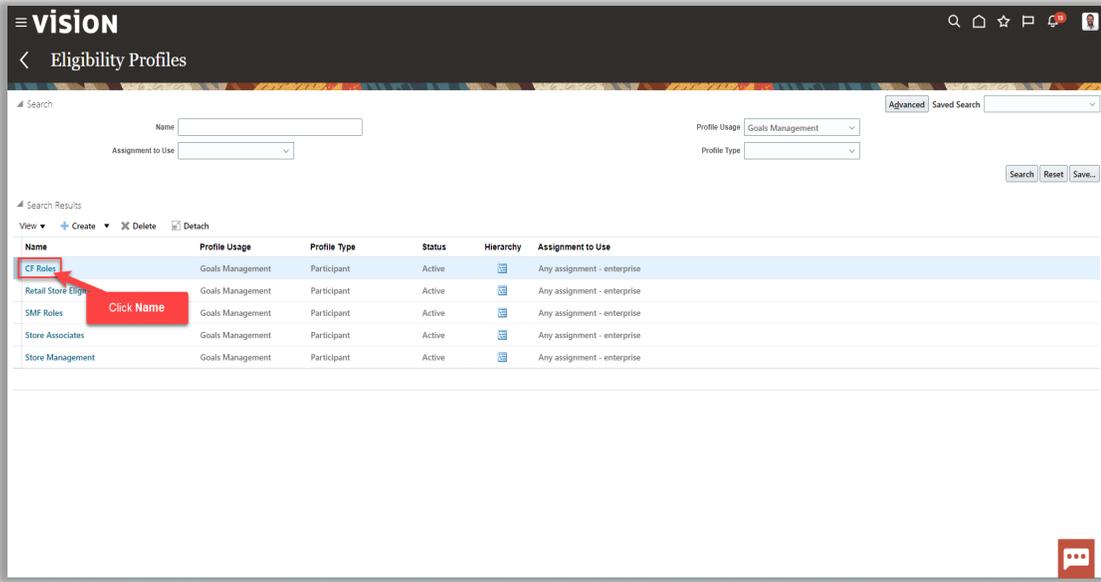
Next, click **Eligibility Profiles**



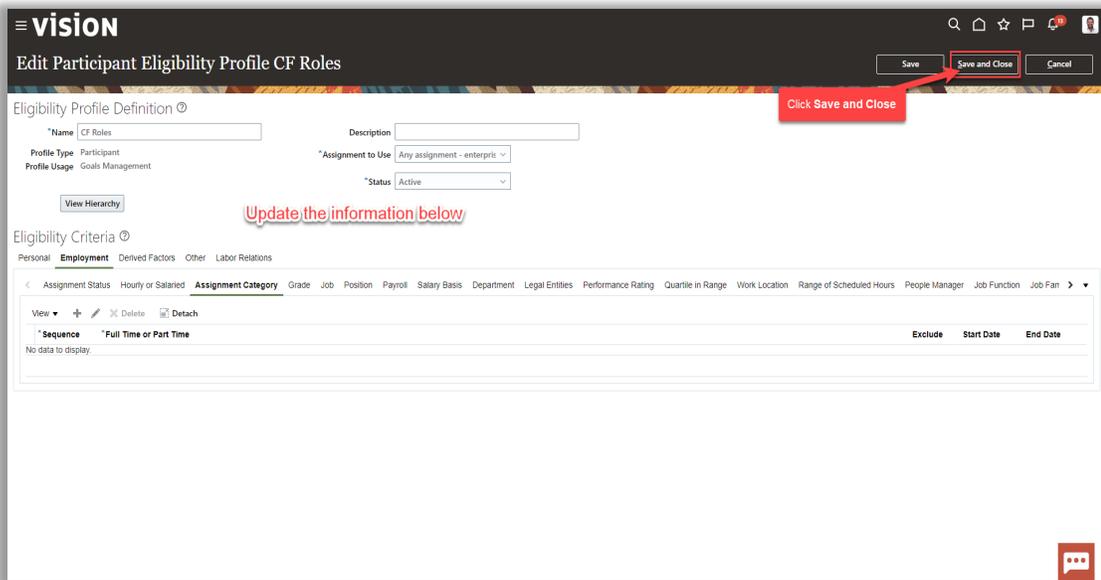
Select the **Profile Usage** from the drop down and click **Search**



Click the **Eligibility Profile Name** we need to **Edit**



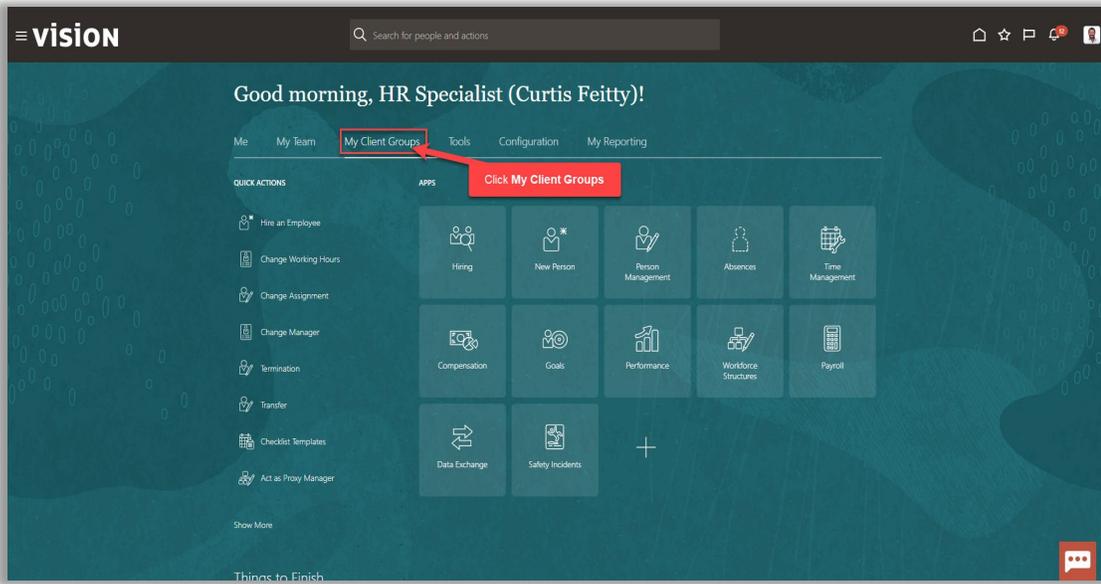
Edit the applicable information and click **Save and Close**



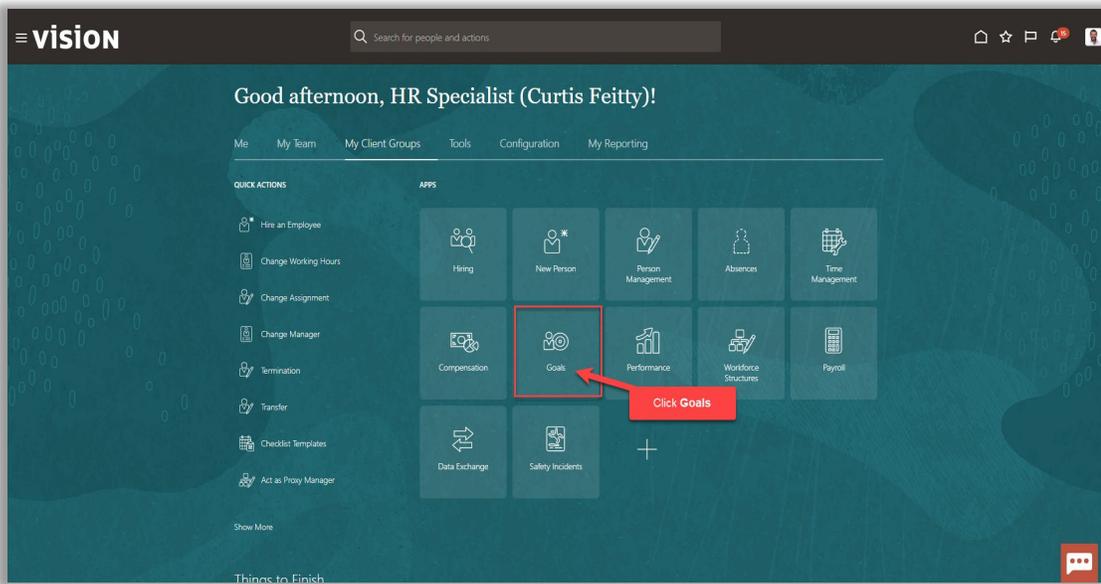
Assign Goal Plan & Monitor Process Results

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

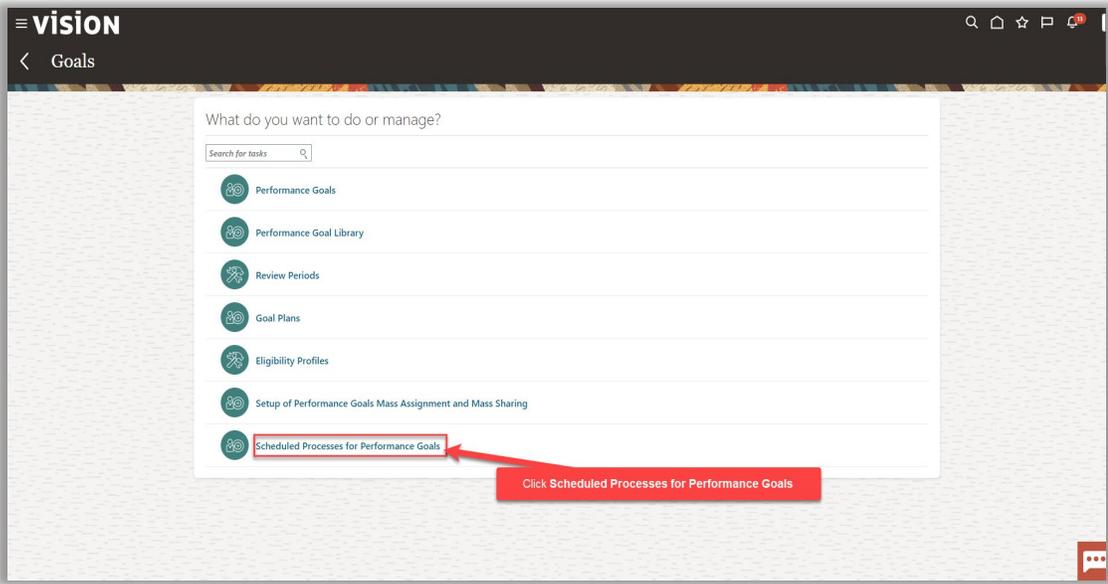
From the home screen, click **My Client Groups**



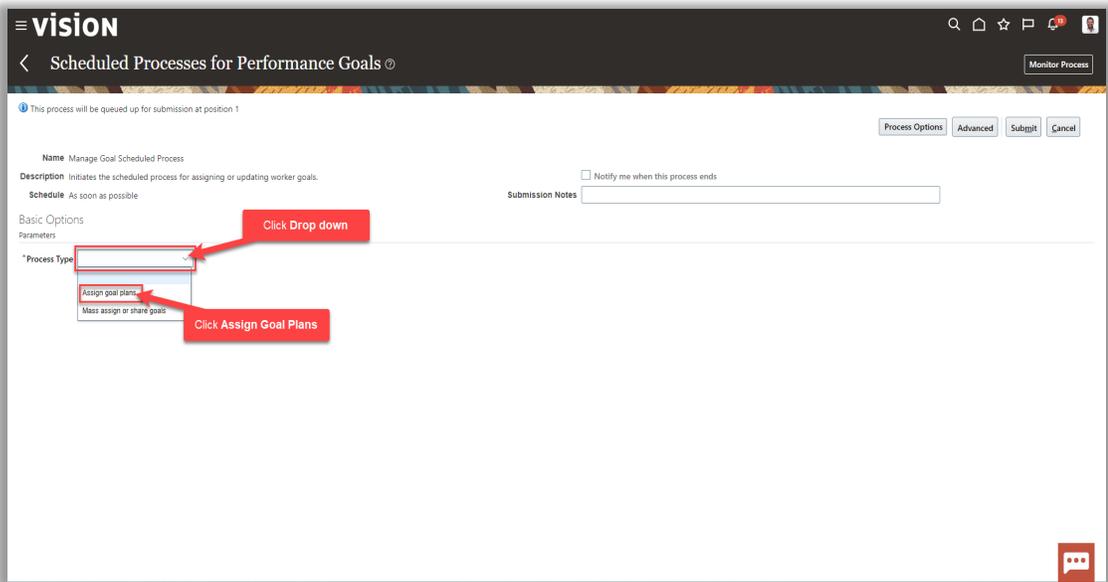
Next, click **Goals**



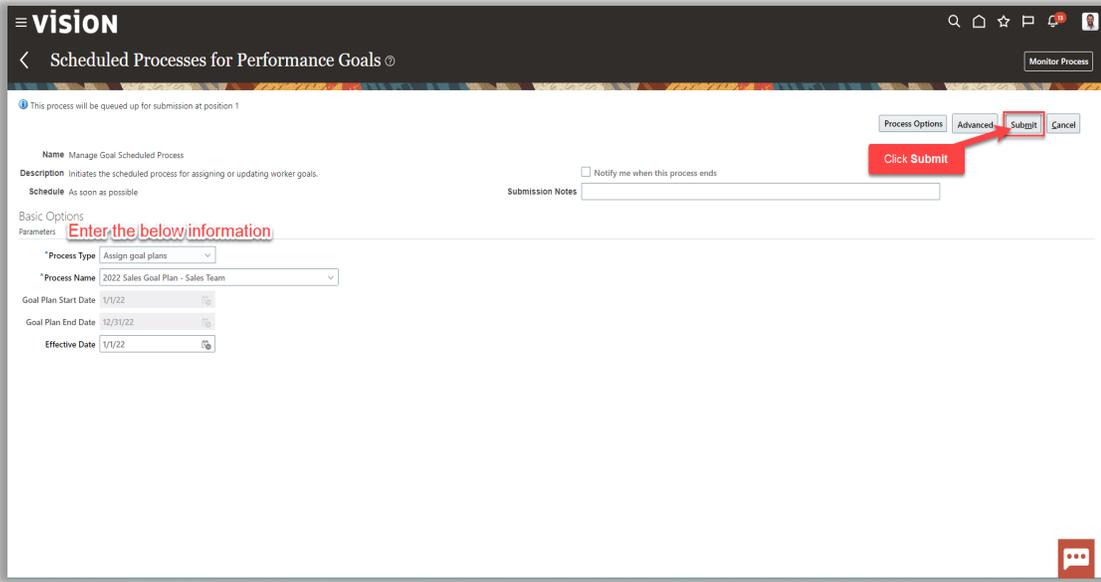
Next, click **Scheduled Processes for Performance Goals**



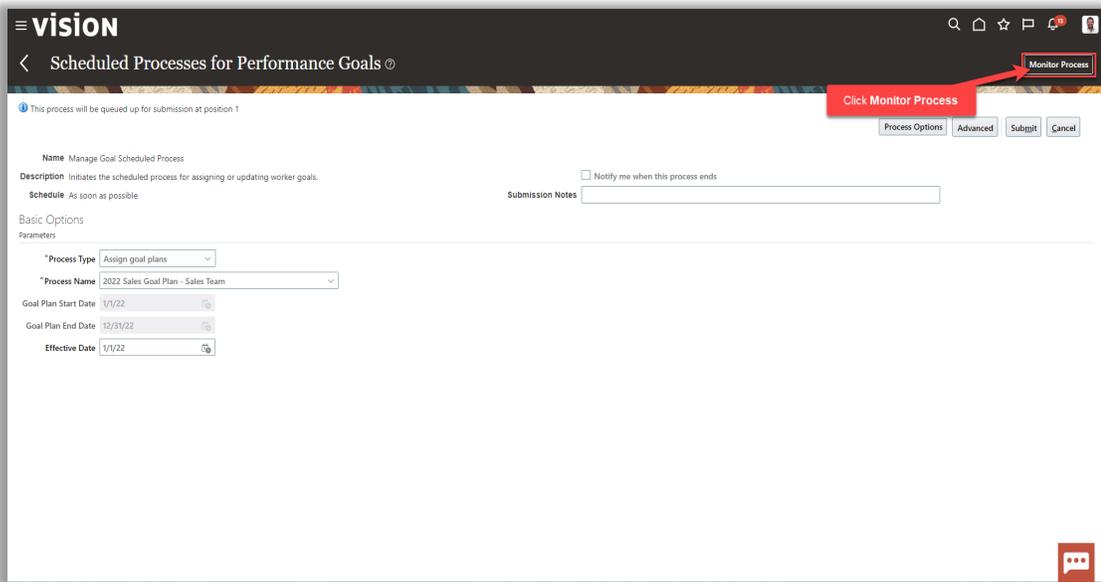
Next, click **Process Type** and from the drop down, click **Assign Goal Plan**



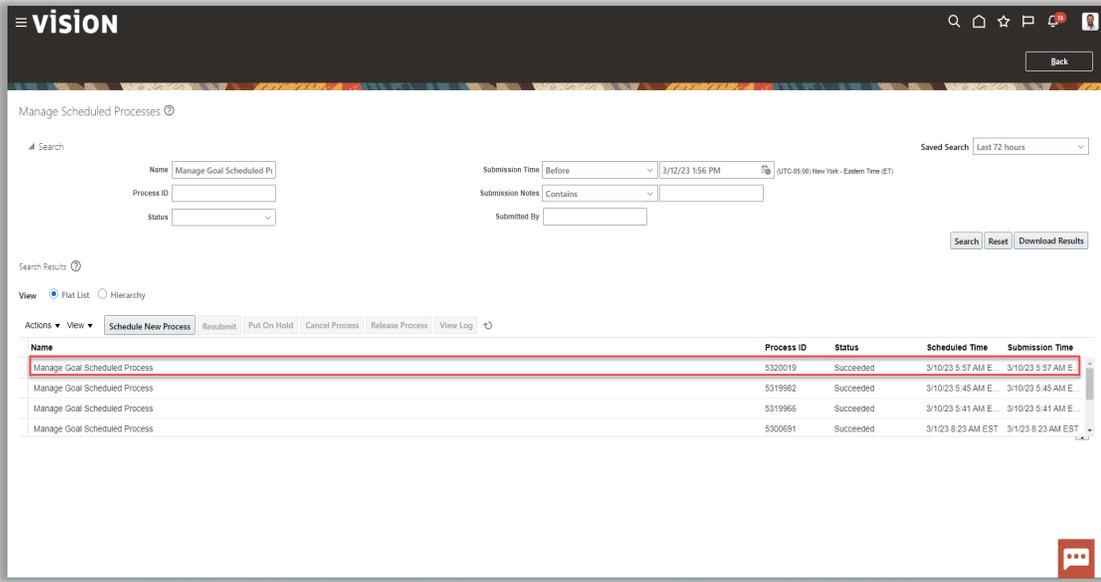
Enter the **Basic Options** and click **Submit**



Lastly, click **Monitor Process**



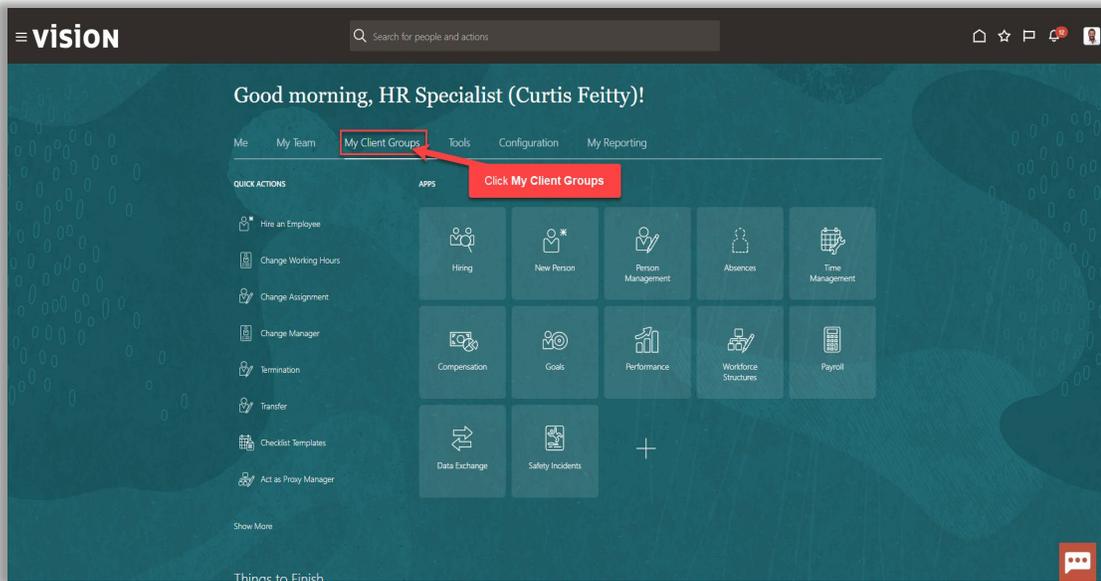
Here we can view the **Scheduled Process Status**



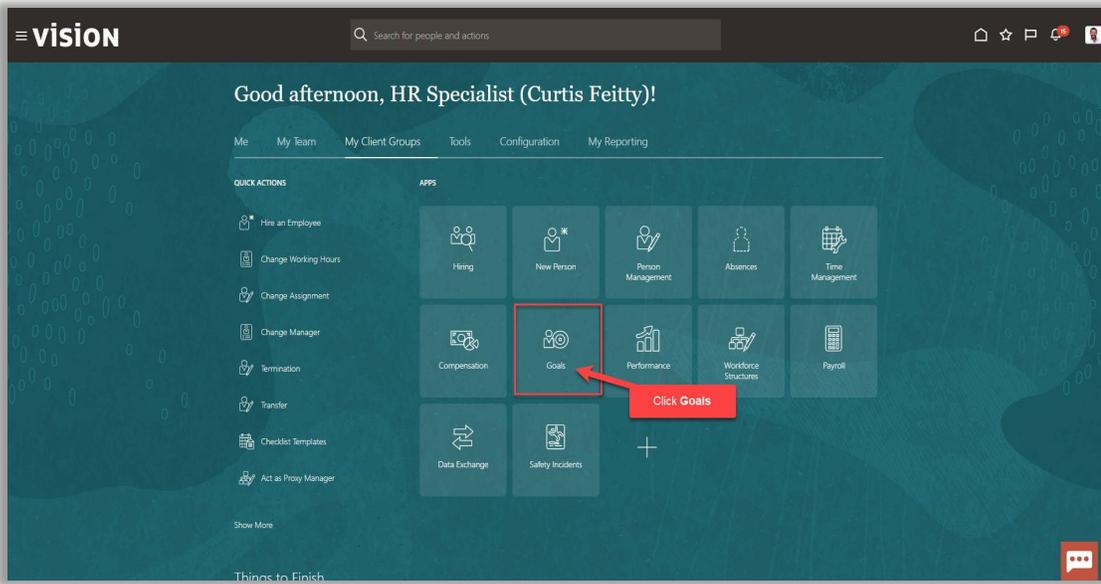
Edit A Worker Goal

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

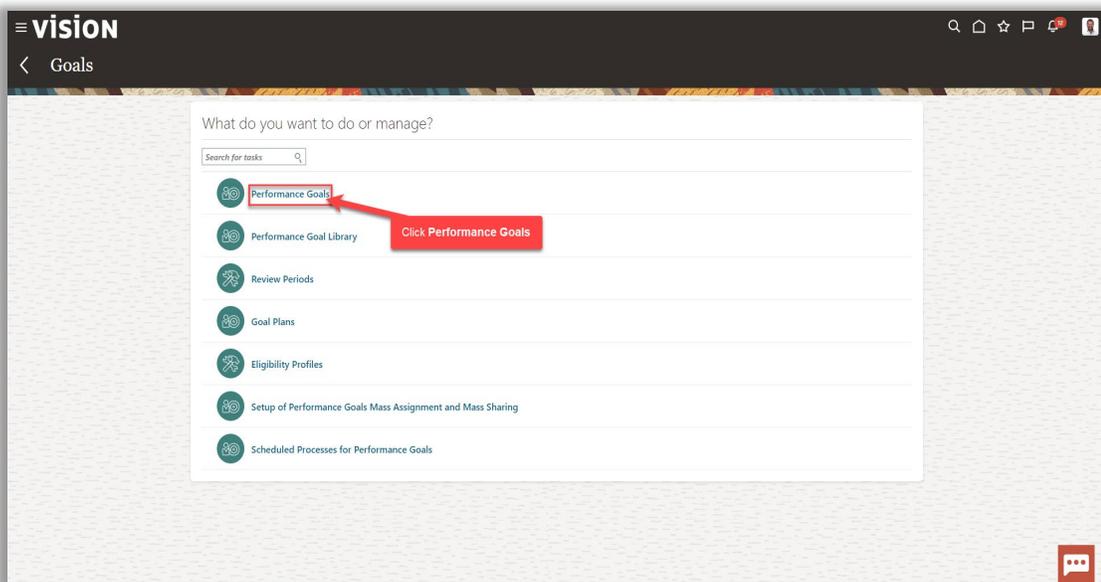
From the home screen, click **My Client Groups**



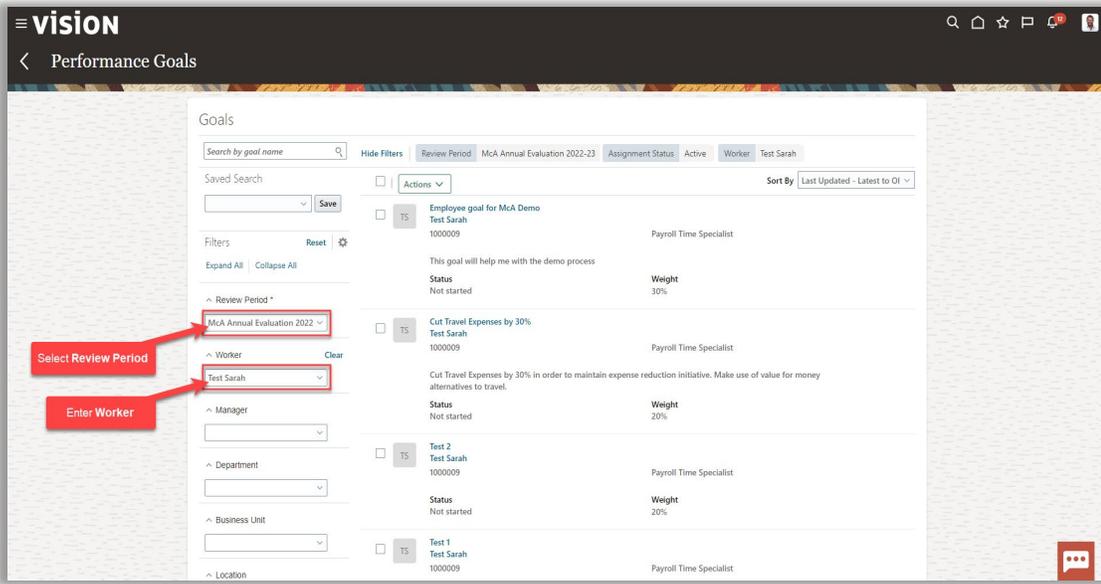
Next, click **Goals**



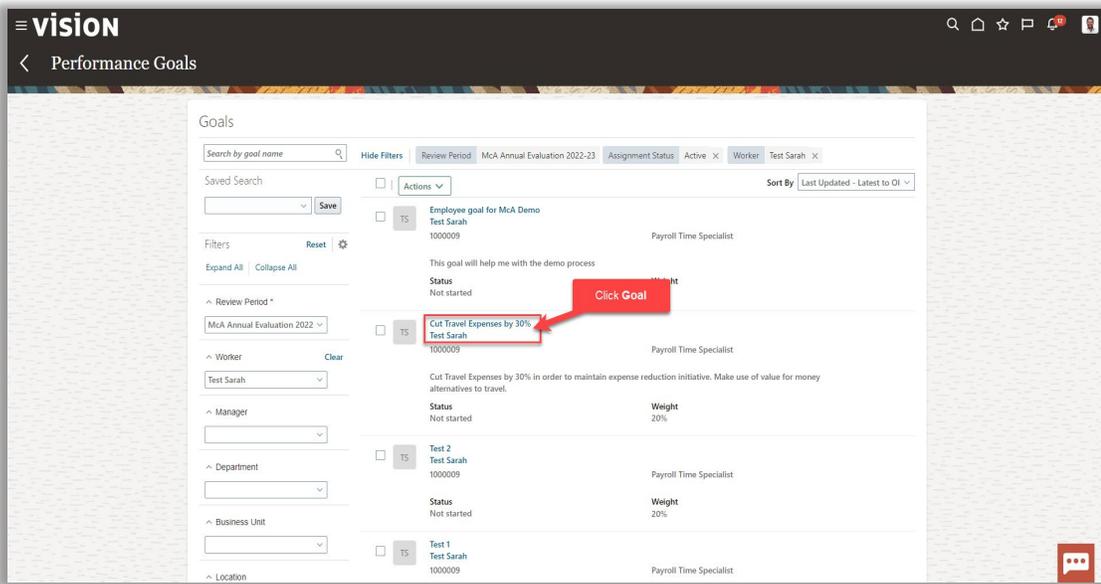
Next, click **Performance Goals**



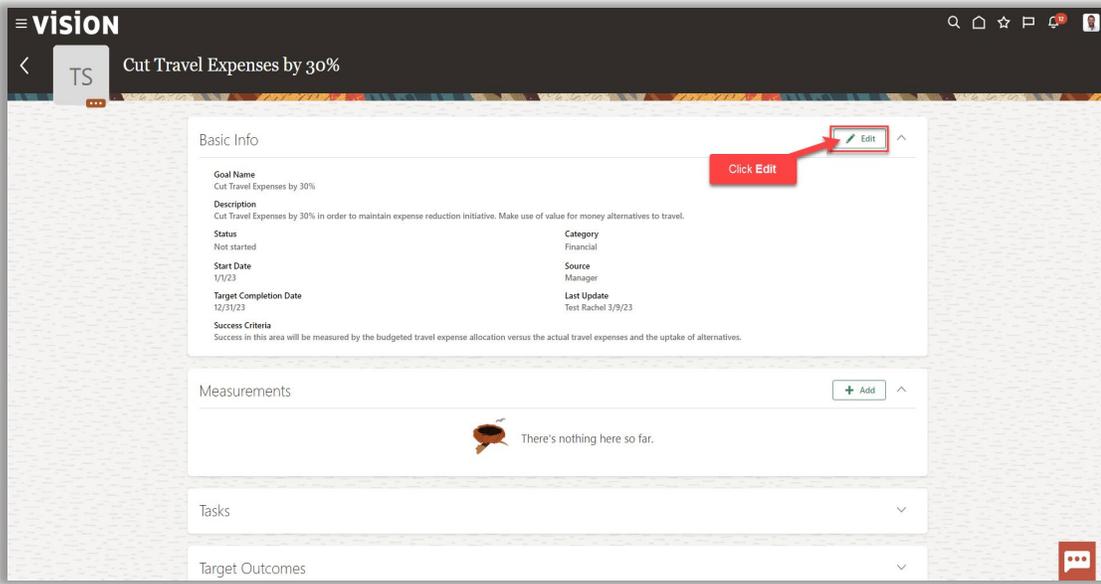
Enter the **Review Period** and the **Worker** and the goals will populate



Select the Goal



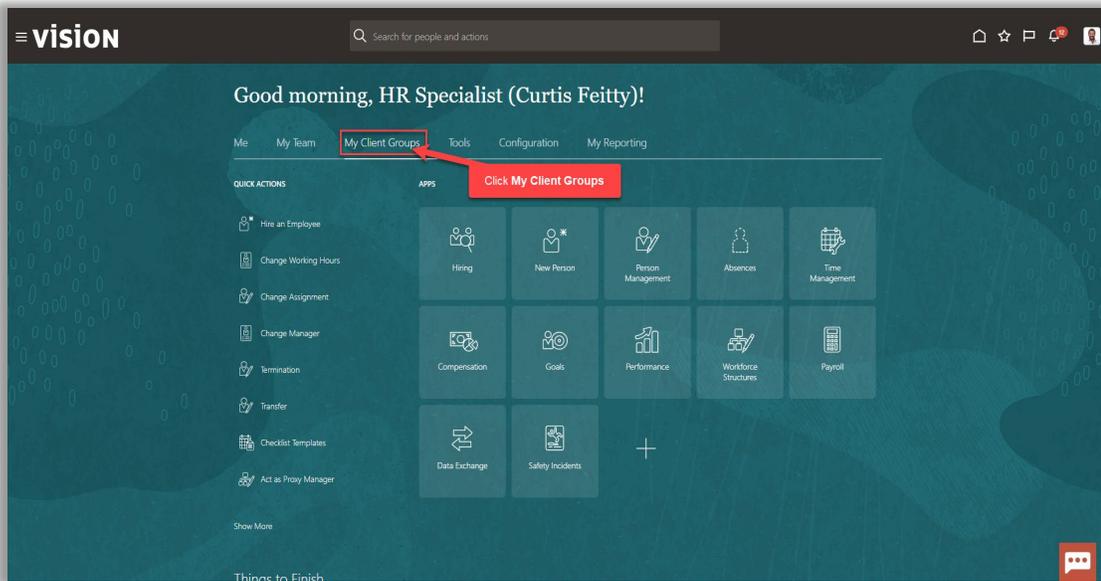
Here we can Edit the Goal Details. To Edit the Basic Info, click Edit



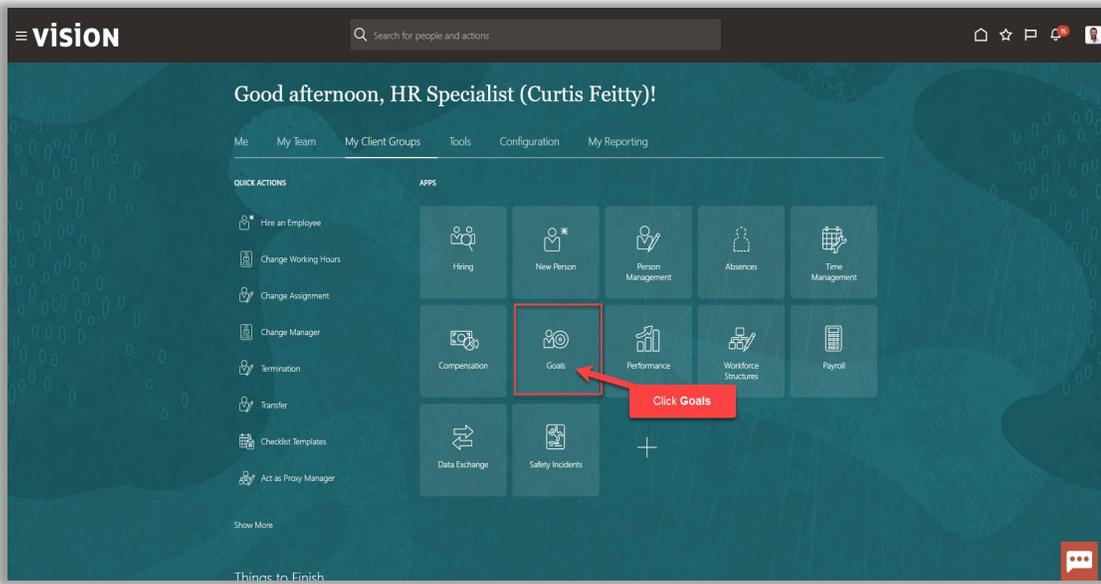
Delete A Worker Goal

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

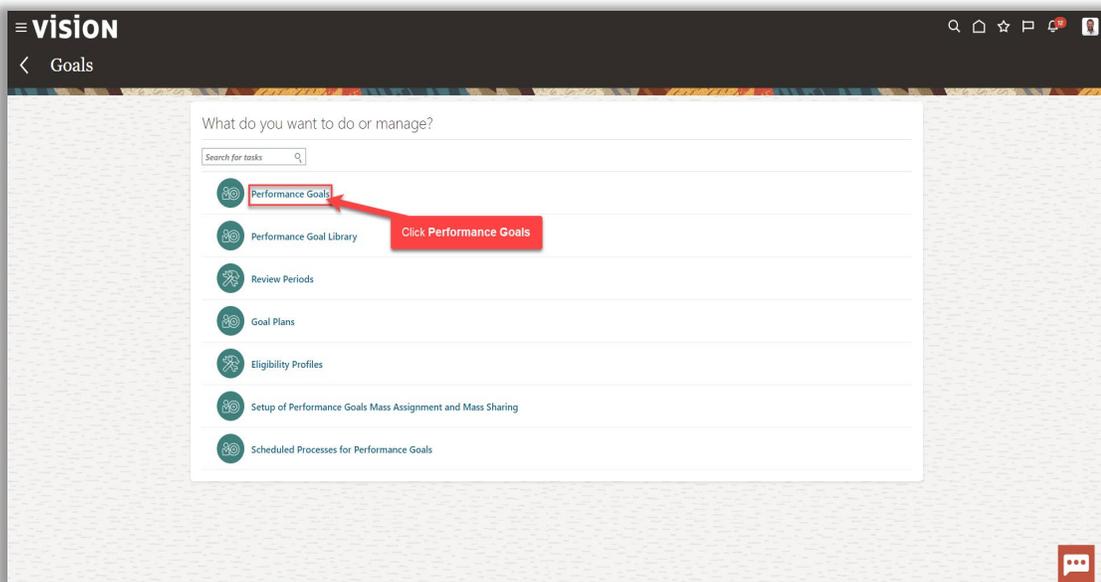
From the home screen, click **My Client Groups**



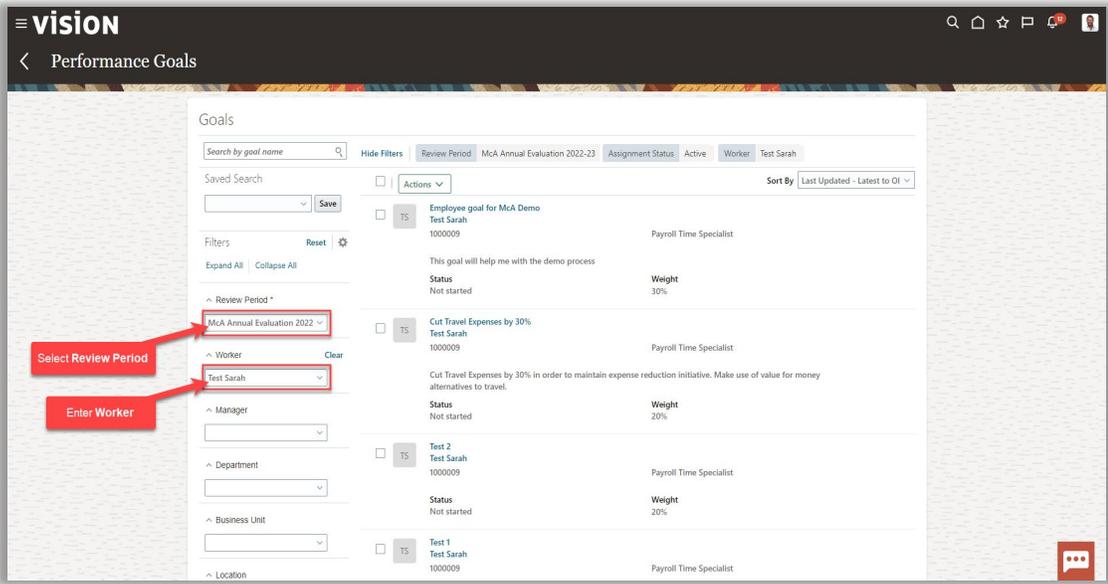
Next, click **Goals**



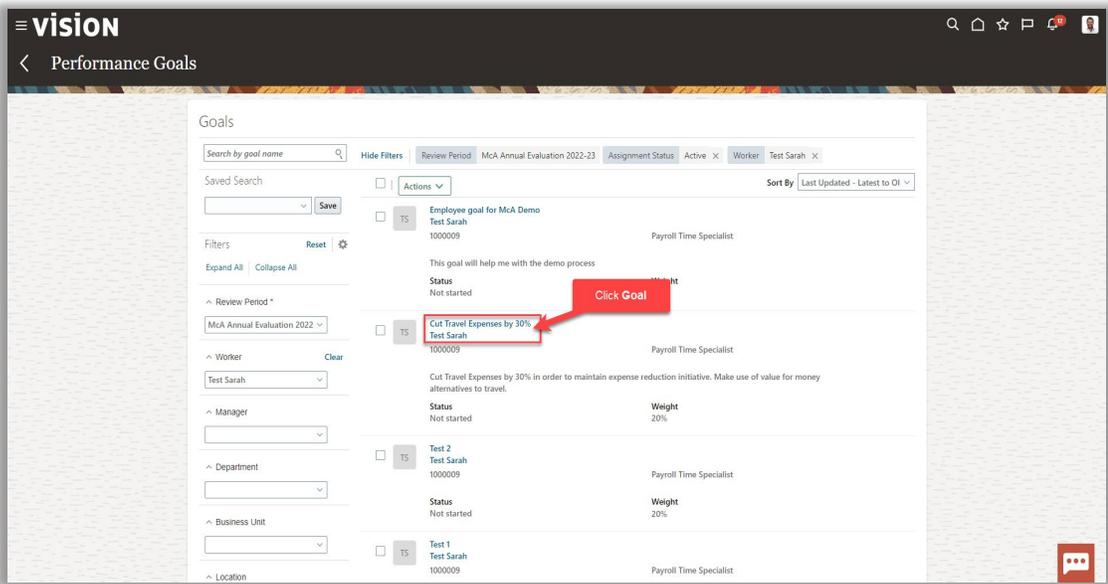
Next, click **Performance Goals**



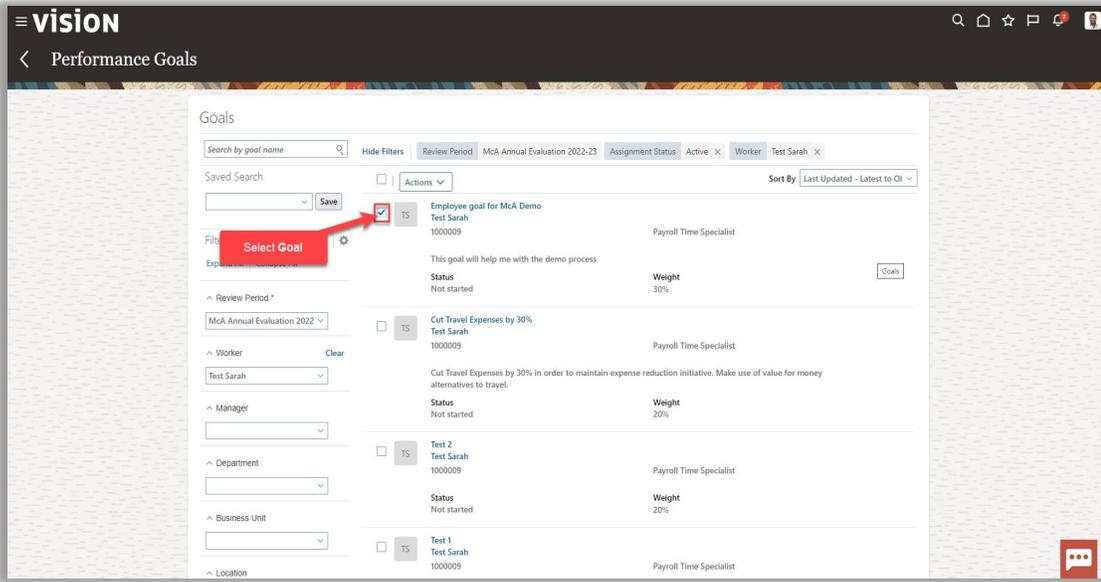
Enter the **Review Period** and the **Worker** and the goals will populate



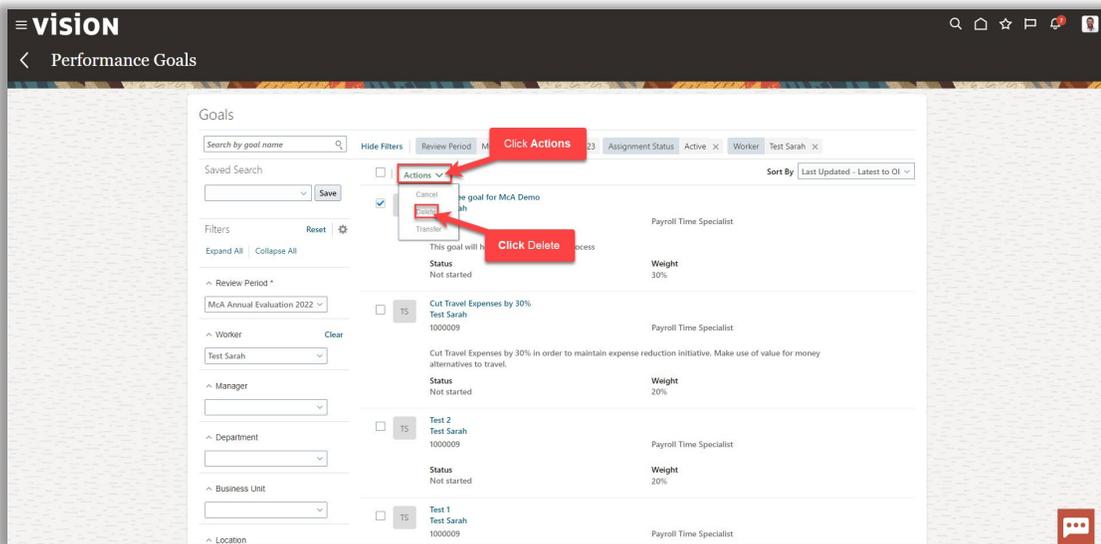
Select the Goal



First, select the Goal



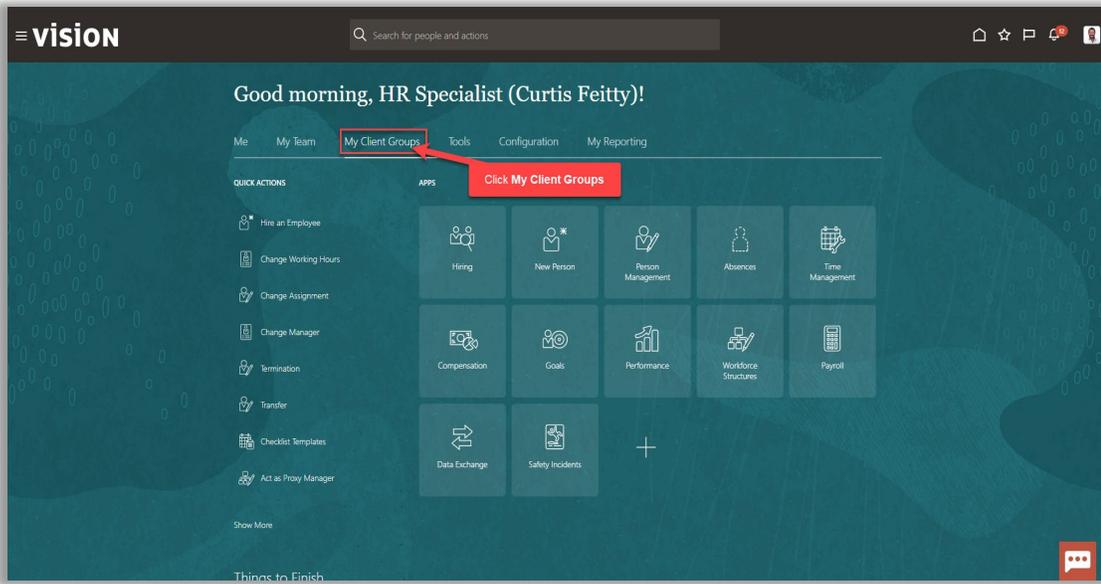
Next, click **Actions** then **Delete**. Click **OK**. As a note, if **Delete** is gray, the ability to delete a goal as an HR Specialist has been disabled. This will need to be enabled in order for an HR Specialist to Delete a Goal



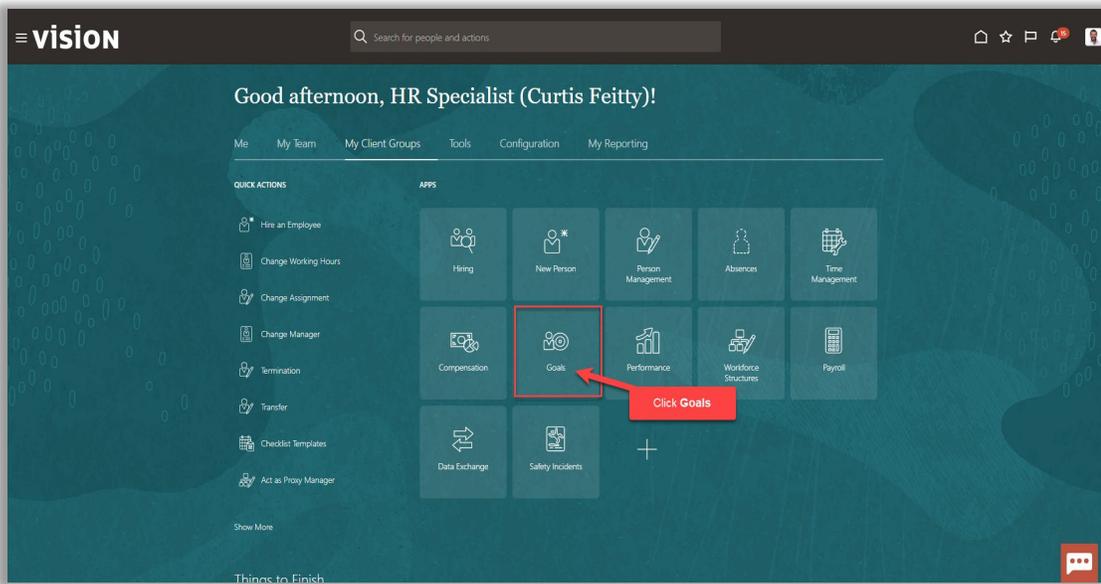
Cancel A Worker Goal

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

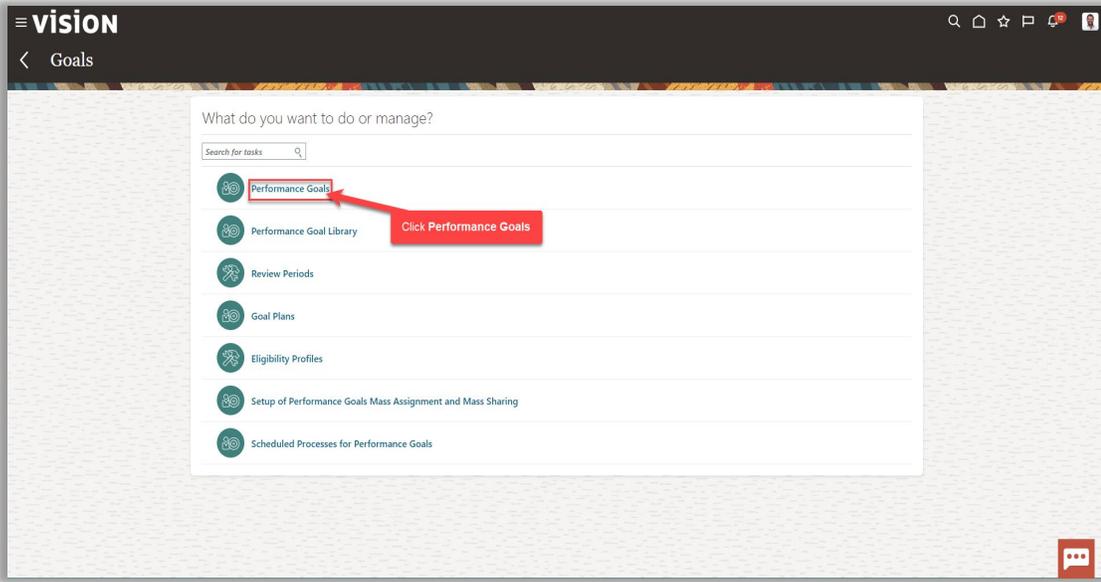
From the home screen, click **My Client Groups**



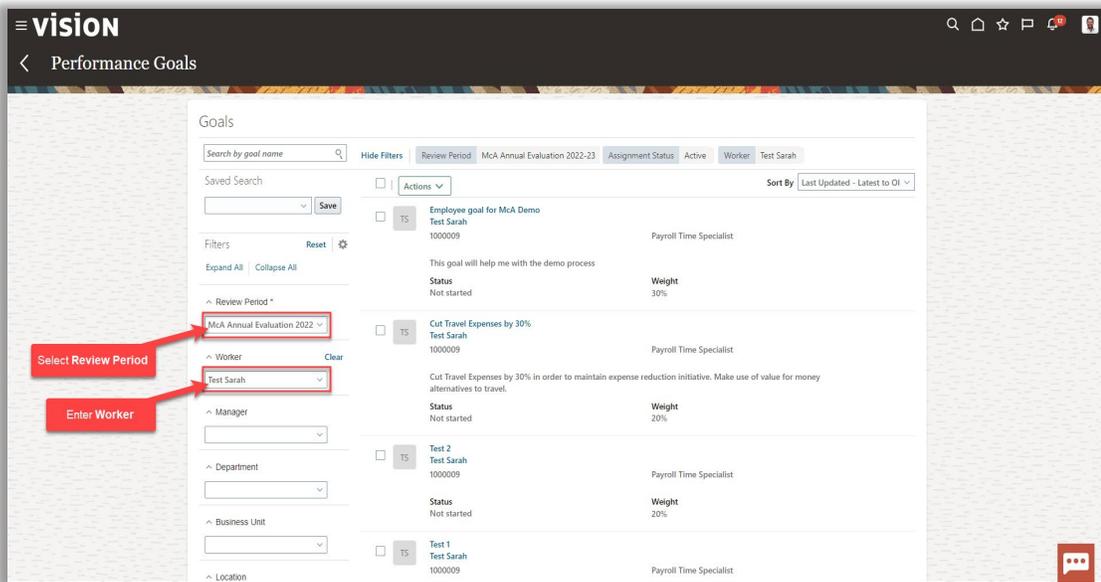
Next, click **Goals**



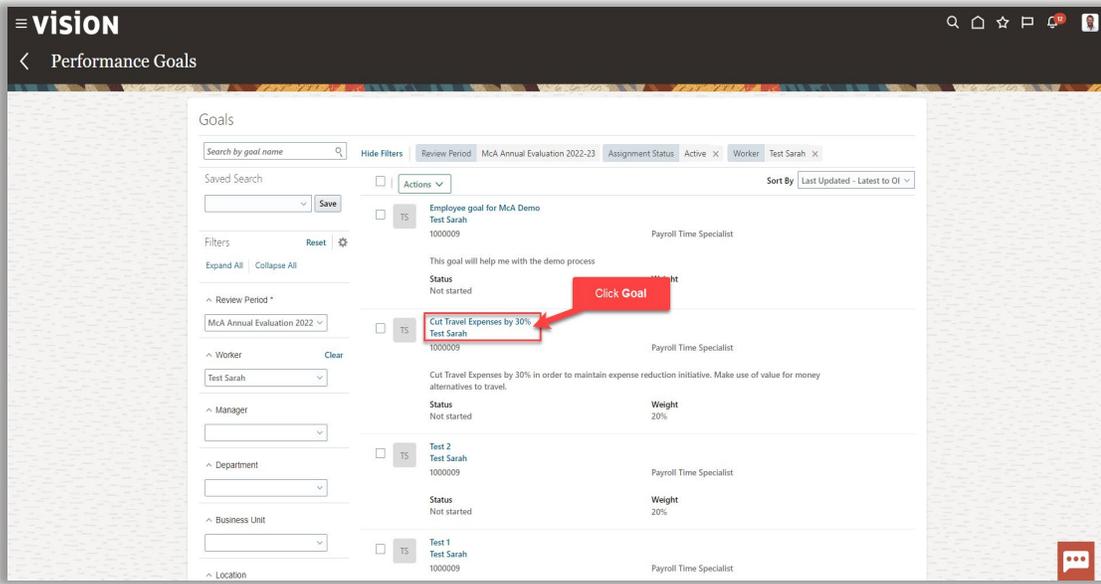
Next, click **Performance Goals**



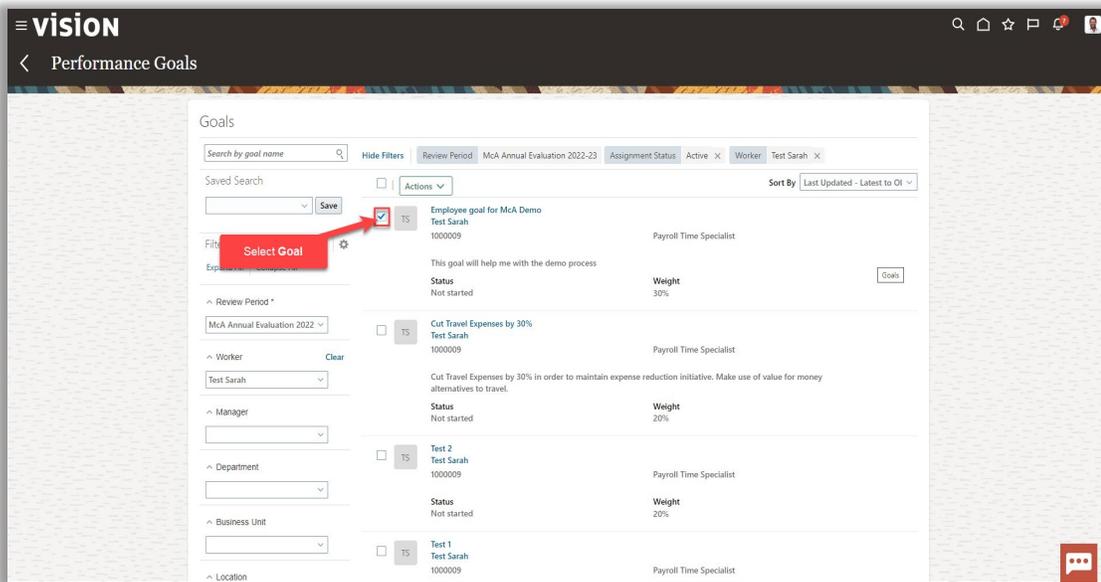
Enter the **Review Period** and the **Worker** and the goals will populate



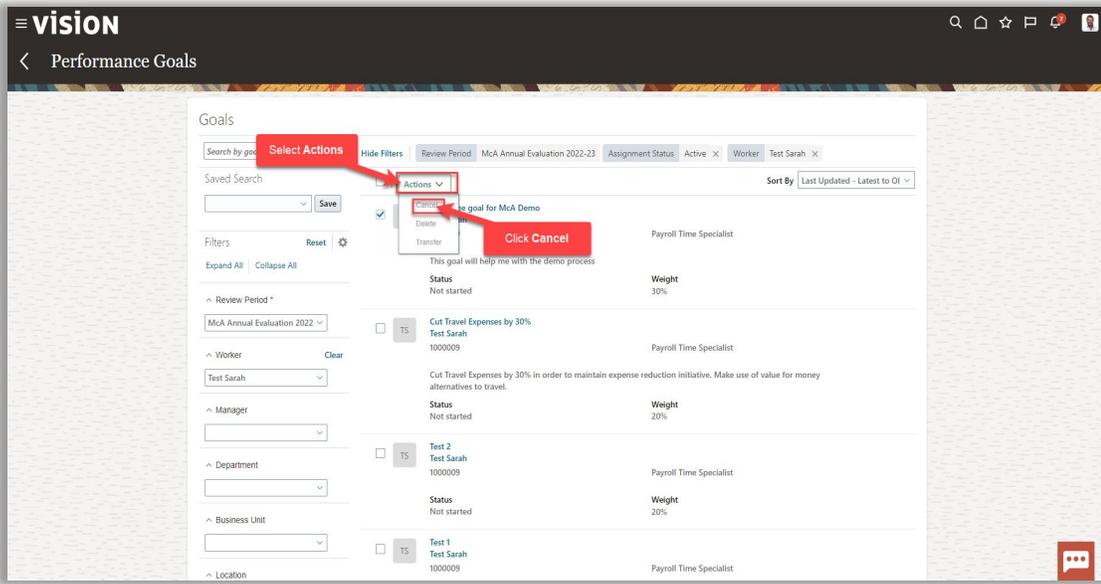
Select the **Goal**



First, select the **Goal**



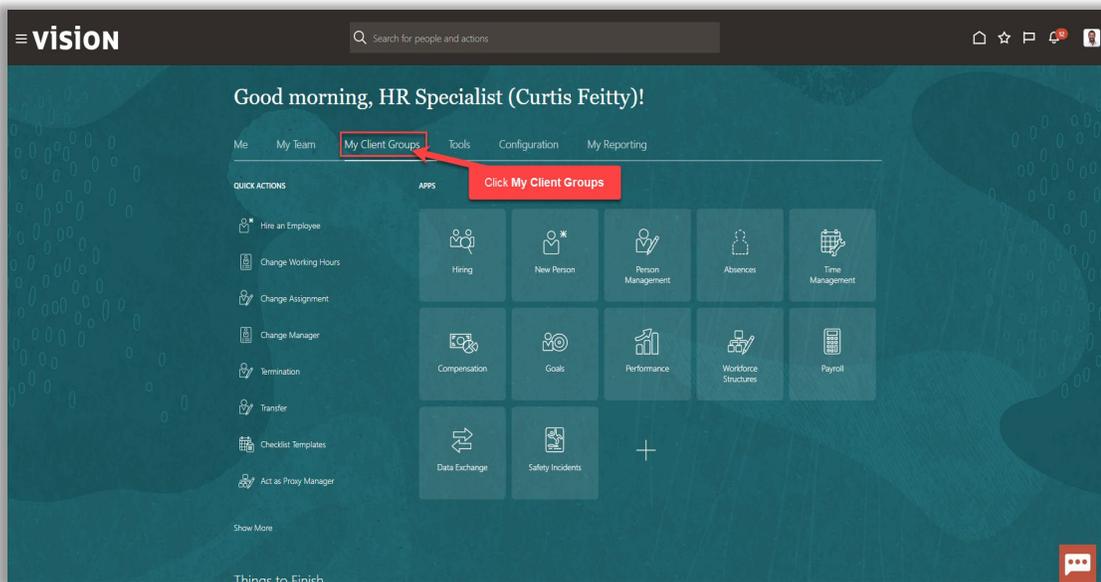
Next, click **Actions** then **Cancel**. Click **OK**. As a note, if **Cancel** is gray, the ability to cancel a goal as an HR Specialist has been disabled. This will need to be enabled in order for an HR Specialist to Cancel a Goal



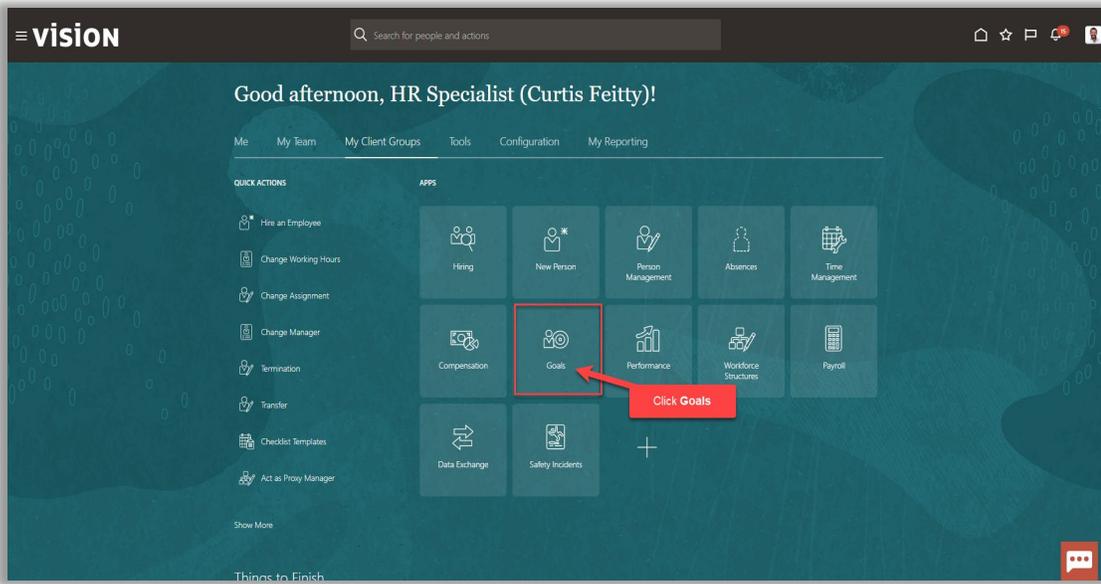
Mass Assignment Of Goals

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

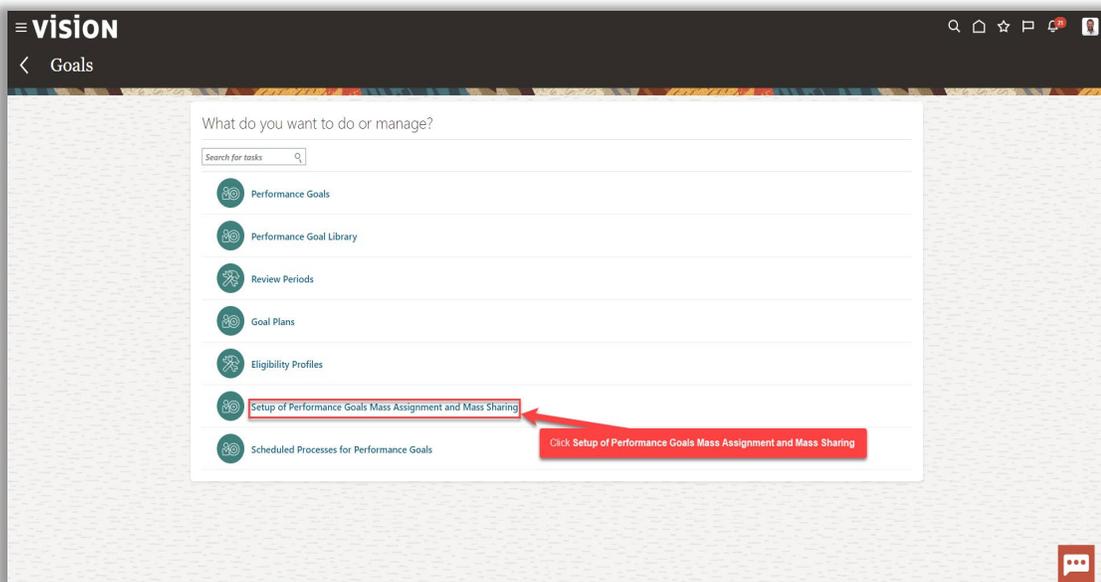
From the home screen, click **My Client Groups**



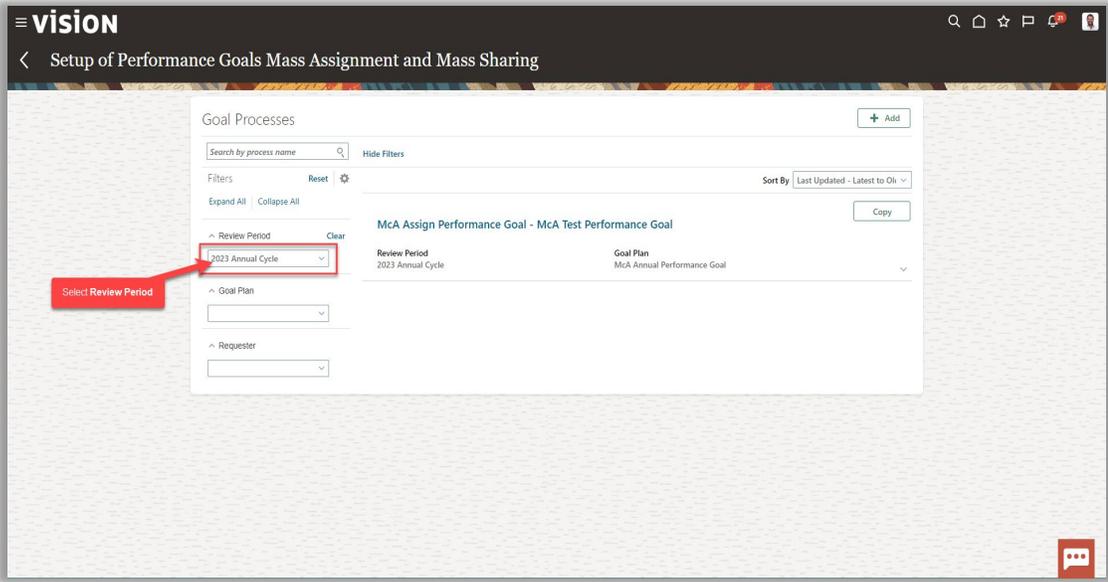
Next, click **Goals**



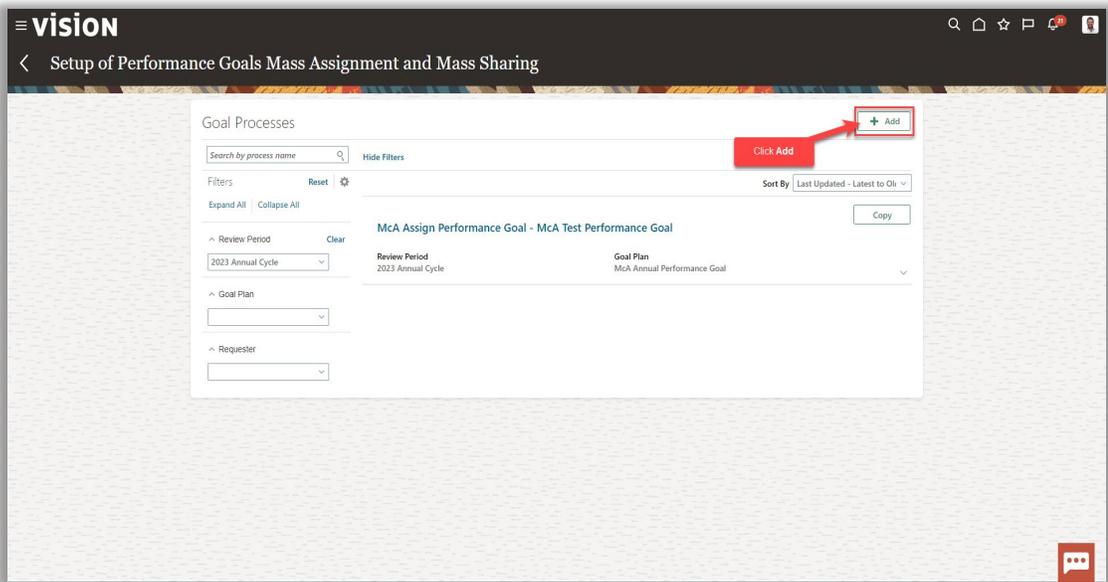
Next, click **Setup of Performance Goals Mass Assignment and Mass Sharing**



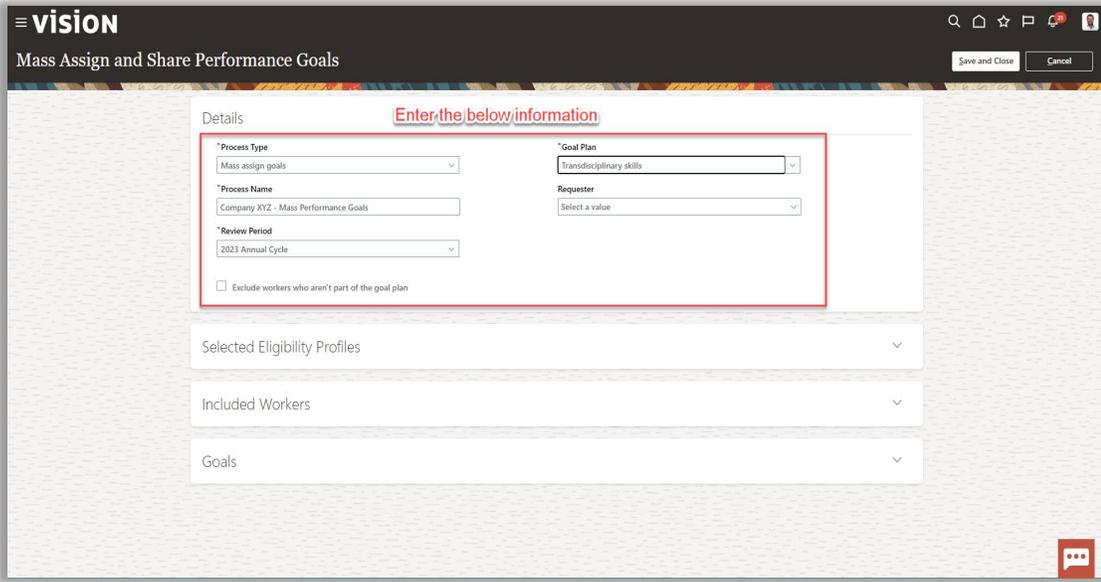
Select the **Review Period**



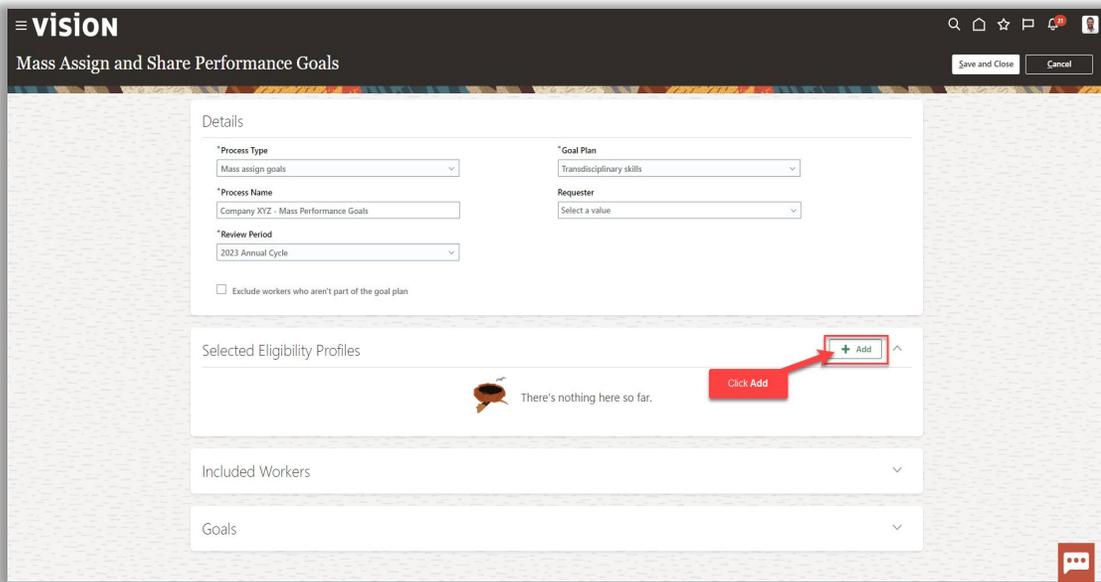
Click Add



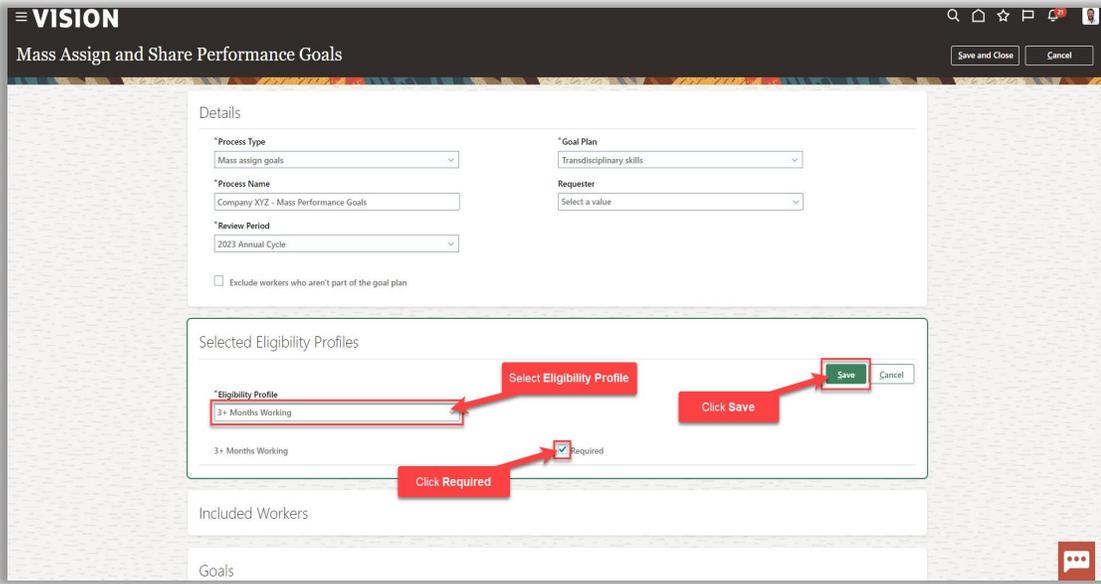
Enter the **Details**. We can Mass assign goals or Mass share goals as the **Process type**



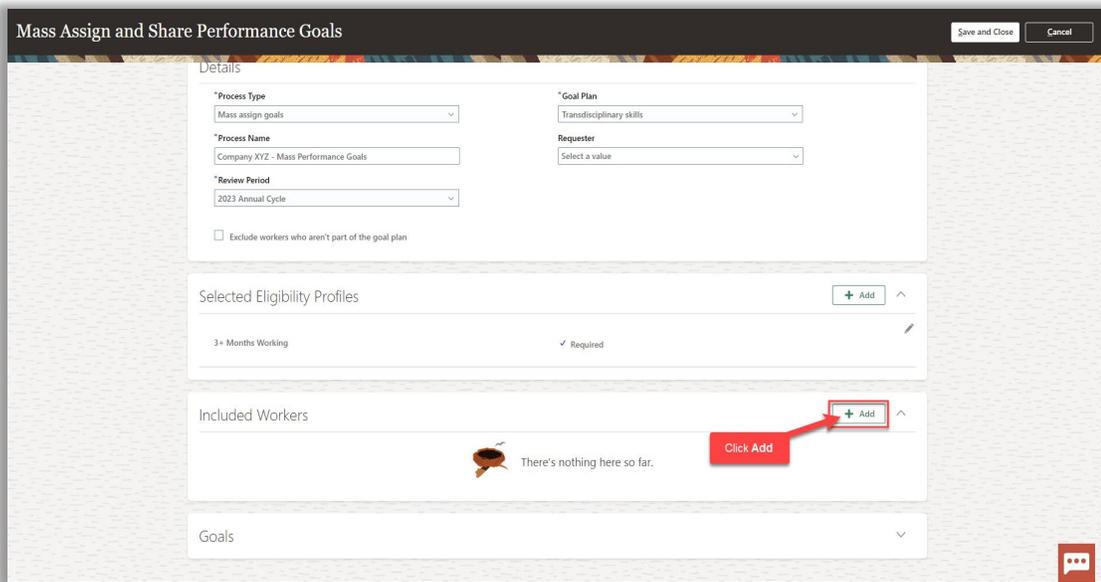
Next, to select the **Eligibility Profiles**, click **Add**



Select the **Eligibility Profile**, click **Required** and then **Save**



Next, to select the **Included Workers**, if applicable, click **Add**



Enter the **Workers Name** in the drop down and click **Save**

Mass Assign and Share Performance Goals

Save and Close Cancel

*Review Period
2023 Annual Cycle

Exclude workers who aren't part of the goal plan

Selected Eligibility Profiles

3+ Months Working Required

Included Workers

*Add Worker

Enter Worker Name

Dmitry Grishin

Click Save

Save Cancel

Dmitry Grishin
Analyst

Self

Person Number
609

Department
Human Resources RU

Goals

Lastly, to add the Goals to mass assign, click **Add**

Mass Assign and Share Performance Goals

Save and Close Cancel

Process Name
Company XYZ - Mass Performance Goals

Requester
Select a value

*Review Period
2023 Annual Cycle

Exclude workers who aren't part of the goal plan

Selected Eligibility Profiles

+ Add ^

3+ Months Working Required

Included Workers

+ Add ^

Dmitry Grishin
Analyst

Self

Goals

There's nothing here so far.

Click Add

+ Add ^

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

VISION
Add Goal

Enter the below information

Click OK

Basic Info

Library Goal
20-25 Customer Calls Per Week

Goal Name
20-25 Customer Calls Per Week

Description
20-25 Customer Calls Per Week

***Start Date**
1/1/51

Target Completion Date
12/31/23

Category
Sales

Success Criteria

Users Permitted to Delete HR-Assigned Goals
Managers only

Status
Not started

Weight
0

This weight may violate the goal plan 100% sum of weights rule when the goal is assigned to a worker.

OK Cancel

Lastly, click **Save and Close**

VISION
Mass Assign and Share Performance Goals

Click Save and Close

Details

***Process Type**
Mass assign goals

***Process Name**
Company XYZ - Mass Performance Goals

***Review Period**
2023 Annual Cycle

Exclude workers who aren't part of the goal plan

Goal Plan
Transdisciplinary skills

Requester
Select a value

Selected Eligibility Profiles

Included Workers

Goals

Save and Close Cancel

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