

# (25B) Oracle Fusion Cloud HCM: Configure Goal and Performance Management

Oracle Talent Management Cloud

DURATION

**3 Days**

MODULES

**22 Lectures**

COURSE CODE

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## Course Overview

Learn to: Create, manage, and assign goals and goal plans for employees and organizations Create performance documents to evaluate workers. Create questionnaires for performance documents Configure templates to create performance documents evaluate employee performance

## What You Will Learn

### Goal Management Overview

- Common Questions
- Oracle Human Capital Management
- What Is A Goal?
- Why Use Goals?
- Who Is Involved In Implementing Goal Management?
- What Types Of Goal Are There?
- How Are Performance Goals Used?
- How Are Development Goals Used?
- Performance Management
- Workforce Goals to Performance\*
- Key Points
- Practices

### Goal Management Setup

- Common Questions
- Implementor Setup Tasks
- Prerequisites
- Enable Goal and Performance Management
- Edit Profile Options

- Edit Lookups
- Edit Descriptive Flexfields
- Additional Configurations
- Key Points
- Practices

## Review Periods

- Common Questions
- What Is A Review Period?
- How Do I Create A Review Period?
- How Can I Modify Review Periods?
- Key Points
- Practices

## The Goal Library

- Common Questions
- Workforce Goals to Performance\*
- What Is The Goal Library?
- Goal Visibility
- How Do You Add Goals To The Goal Library? Step 1: Set The Library Info
- How Do You Add Goals To The Goal Library? Step 2: Configure The Goal
- Key Points
- Practices

## Goal Plans

- Common Questions
- Workforce Goals to Performance\*
- What Is A Goal Plan?
- How Are Goal Plans Used?
- Primary Goal Plans
- How Do You Create A Goal Plan?
- How Do You Add Goals To A Goal Plan?
- How Do You Assign Goal Plans To Workers?
- Key Points
- Practices

## Eligibility Profiles for Goals

- Common Questions
- What Is An Eligibility Profile?
- How Are Eligibility Profiles Used?
- How Do You Create An Eligibility Profile?
- How Do You Add Criteria To An Eligibility Profile?
- How Do You Use An Eligibility Profile?
- How Do Eligibility Profiles Combine?

- Key Points
- Practices

## Goal Administration

- Common Questions
- Workforce Goals to Performance\*
- What Is A Goal?
- How Does A Worker Get Assigned A Performance Goal?
- How Does A Worker Get Assigned A Development Goal?
- Goal Assignment, Sharing, And Alignment
- What Are The Components Of A Goal?
- Implementing Goals: Profile Options For Goals
- Implementing Goals: Redwood Experience For Goals
- Implementing Goals: Lookups
- How Do You Create A Goal? Step 1: Describe The Goal
- How Do You Create A Goal? Step 2: Provide Performance Details
- How Do You Create A Goal? Step 2: Provide Development Details
- How Do You Create A Goal? Step 3: Add Measurements and Tasks
- What Else Can Workers Do With Goals?
- Key Points
- Practices

## Scheduled Processes For Goals

- Common Questions
- What Processes Are There That Support Goal Management?
- Assign Goal Plans
- Configure Mass Assignment Or Sharing
- Mass Assign Or Share Goals
- Purge Goal Temporary Records
- Check Goal Data Integrity
- Key Points
- Practices

## Goal Approvals

- Common Questions
- Workforce Goals to Performance\*
- When Are Approvals Required For Goal Changes?
- Goal Approval Process
- How Do You Configure The Goal Approval Process?
- Transaction Console: Enable Automatic Approvals
- Configure The Rule
- Additional Configurations
- Administrative Approval
- Key Points

- Practices

## Goal And Performance Notifications

- Common Questions
- Workforce Goals to Performance\*
- How Are Users Notified Of Important Goal Changes?
- What Tool Do You Use To Configure Goal Notifications?
- How Do You Enable Or Disable A Goal Notification?
- How Do You Edit A Goal Notification?
- Performance Notifications: Profile Options
- Performance Notification: Enable or Disable Individual Notifications
- Key Points
- Practices

## Performance Management Overview

- Common Questions
- Workforce Goals to Performance\*
- What Is A Performance Document?
- What Types Of Performance Document Are There?
- What Are The Components Of A Performance Document?
- What Is A Check-In Document?
- Who Is Involved In the Performance Management Cycle?
- Key Points

## Performance Management Setup

- Common Questions
- Implementor Setup Tasks
- Enable Goal and Performance Management
- Redwood Experience For Performance Check-Ins
- Edit Profile Options
- Edit Lookups
- Edit Descriptive Flexfields
- Additional Configurations
- Key Points
- Practices

## Questionnaires

- Common Questions
- Workforce Goals to Performance\*
- What Is A Questionnaire?
- How Do You Create A Questionnaire?
- Configure The Question Library: Subscriber And Folder
- Add A Question To The Question Library: Add Basic Information
- Add A Question To The Question Library: Add The Question

- Add A Question To The Question Library: Add The Response
- Create A Questionnaire Template: Basic Information
- Create A Questionnaire Template: Content Formatting
- Create A Questionnaire Template: Add Sections And Questions
- Create A Questionnaire: Choose The Template
- Create A Questionnaire: Basic Information
- Create A Questionnaire:
- Create A Questionnaire: Scoring
- Key Points
- Practices

## Performance Process Flows

- Common Questions
- Workforce Goals to Performance\*
- What Is A Performance Process Flow?
- What Are The Available Tasks For A Performance Process Flow? Tasks That Do Not Have Subtasks
- What Are The Available Tasks For A Performance Process Flow? Tasks That Have Subtasks
- How Do You Create A Performance Process Flow? Step 1: Enter the Basic
- Details
- How Do You Create A Performance Process Flow? Step 2: Add Tasks And Set Options For Them
- How Do You Create A Performance Process Flow? Step 3: Name The Tasks And Set The Task Sequence
- Key Points
- Practices

## Eligibility Profiles for Performance Documents

- Common Questions
- What Is An Eligibility Profile?
- How Are Eligibility Profiles Used?
- How Do You Create An Eligibility Profile?
- How Do You Add Criteria To An Eligibility Profile?
- How Do You Use An Eligibility Profile?
- Use Eligibility Profiles For Specific Review Periods
- Use Eligibility Profiles For Check-In Templates
- How Do Eligibility Profiles Combine?
- Run The Eligibility Batch Process
- Manage Individual Eligibility
- Key Points
- Practices

## Performance Document Types And Template Sections

- Common Questions
- Workforce Goals to Performance\*
- What Is A Performance Document Type?
- How Do You Create A Performance Document Type?

- What Is A Performance Template Section?
- What Performance Template Section Types Are Available?
- How Do You Create A Performance Template Section? Step 1: Configure The Section Details
- How Do You Create A Performance Template Section? Step 2: Configure The Section Processing
- How Do You Create A Performance Template Section? Step 3: Configure The Item Processing
- Key Points
- Practices

## Performance Templates

- Common Questions
- Workforce Goals to Performance\*
- Review: Performance Templates
- How Do You Create A Performance Template?
- Step 1.1: What Information Do You Enter?
- Step 1.2: Add The Participants
- Step 2: Configure the Performance Process Flow
- Step 3: Add Sections
- Step 4: Add Section Items
- Step 5: Add Review Periods and Deadlines
- Check-In Templates
- Key Points
- Practices

## Performance Evaluations

- Common Questions
- Workforce Goals to Performance\*
- Who Creates Performance Documents?
- Who Does What?
- All-In-One Performance Documents
- What Can HR Specialists Do?
- Key Points
- Practices

## Configure The User Interface

- Common Questions
- Which Tool Do You Use?
- What Is Transaction Design Studio?
- How Do You Use Transaction Design Studio?
- What Is Visual Builder Studio?
- How Do You Use Visual Builder Studio?
- What Other Tools Are There?
- Key Points

## Auditing

- Common Questions
- What Is Auditing?
- How Do You Enable Auditing?
- Configure An Audit Object
- Review The Audit Logs
- Key Points
- Practices

## Troubleshooting

- Common Questions
- What Are Some Common Issues In Goal And Performance Management?
- Is The Issue Expected Application Behavior?
- Check The Performance Roles For The Template
- Check The Security Roles
- Diagnostic Tests
- Key Points
- Practices

## Information Resources

- Information Resources
- Oracle Help Center
- My Oracle Support
- Oracle Cloud Customer Connect
- Oracle University
- Oracle Partner Community