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

Oracle Talent Management Cloud

DURATION	MODULES	COURSE CODE
3 Days	**22 Lectures**	**—**

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