



DP World

Oracle Fusion Goals

2. User Manual – Goal Management (For Region / BU HR)

Document Control

Change Record

Date	Author	Version	Change Reference
12-Feb-2020	Sabyasachi P	V1.0	First version of document.
26-Mar-2020	Anne McCrystal	V1.0	Incorporated the review comments

Reviewers

Name	Position
Jasmine Parekh	Sr. Manager – Performance & Productivity
Anne McCrystal	HCM Project Manager

Approvers

Name	Position	Date of Approval	Signature

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Introduction

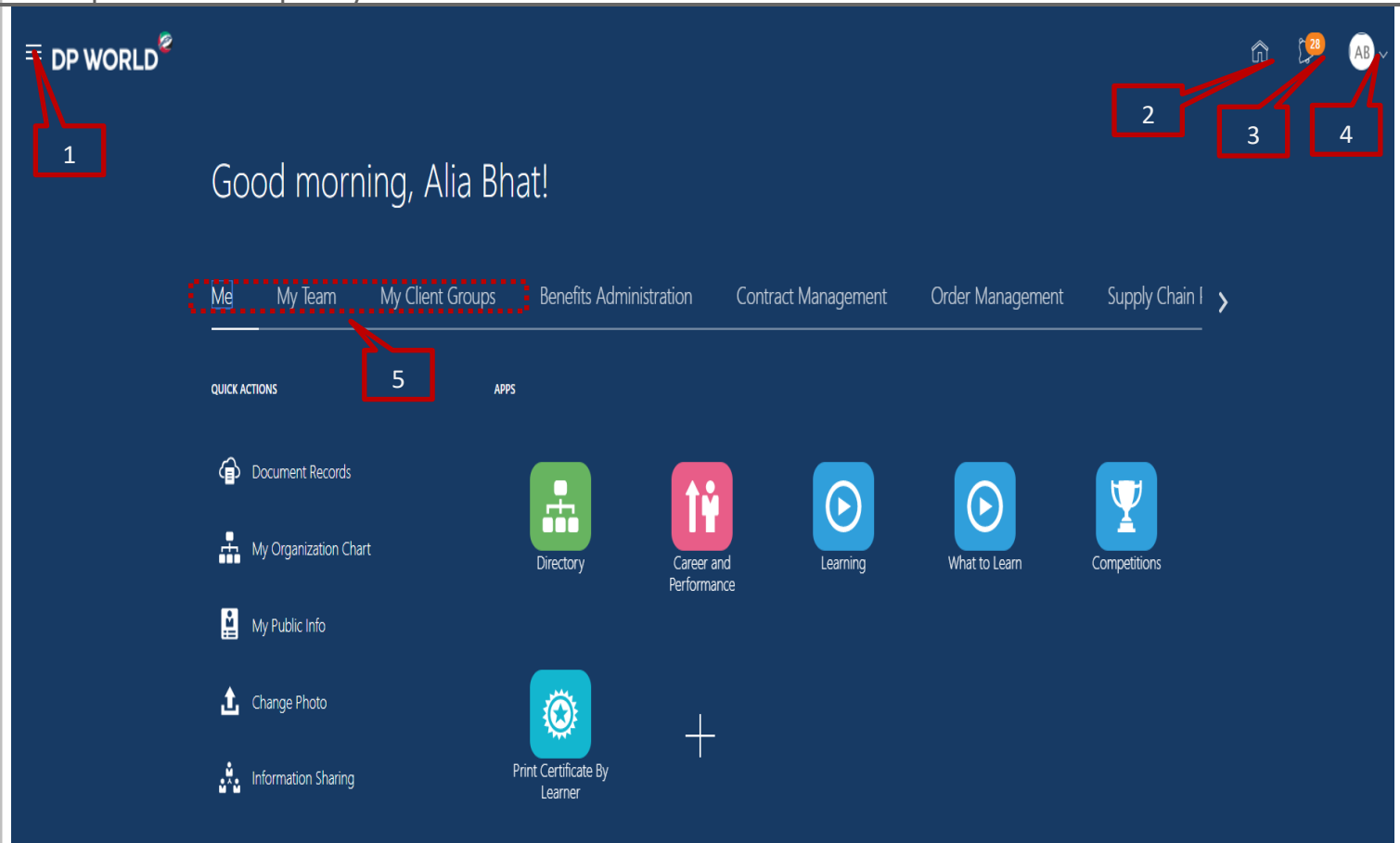
The purpose of this document is to:

- Describe the how to navigate and complete the goal related task for HR Specialist. This includes tasks relating to adding and managing goals for Employees.

User Manual Guide

This User Manual describes the system workflow / process using the screenshots in the Oracle system. Below the screenshot, you will find the explanation (if any) and the navigation steps to complete the process.

The screenshot given below is the home page, the key navigation areas in the Home Page are numbered and explained subsequently.



Explanation: Explanation (If any) with regards to the screenshot is included here. 6









a) Navigation steps (Any field or tab mentioned in the navigation steps is highlighted in the screenshot)

b) 7

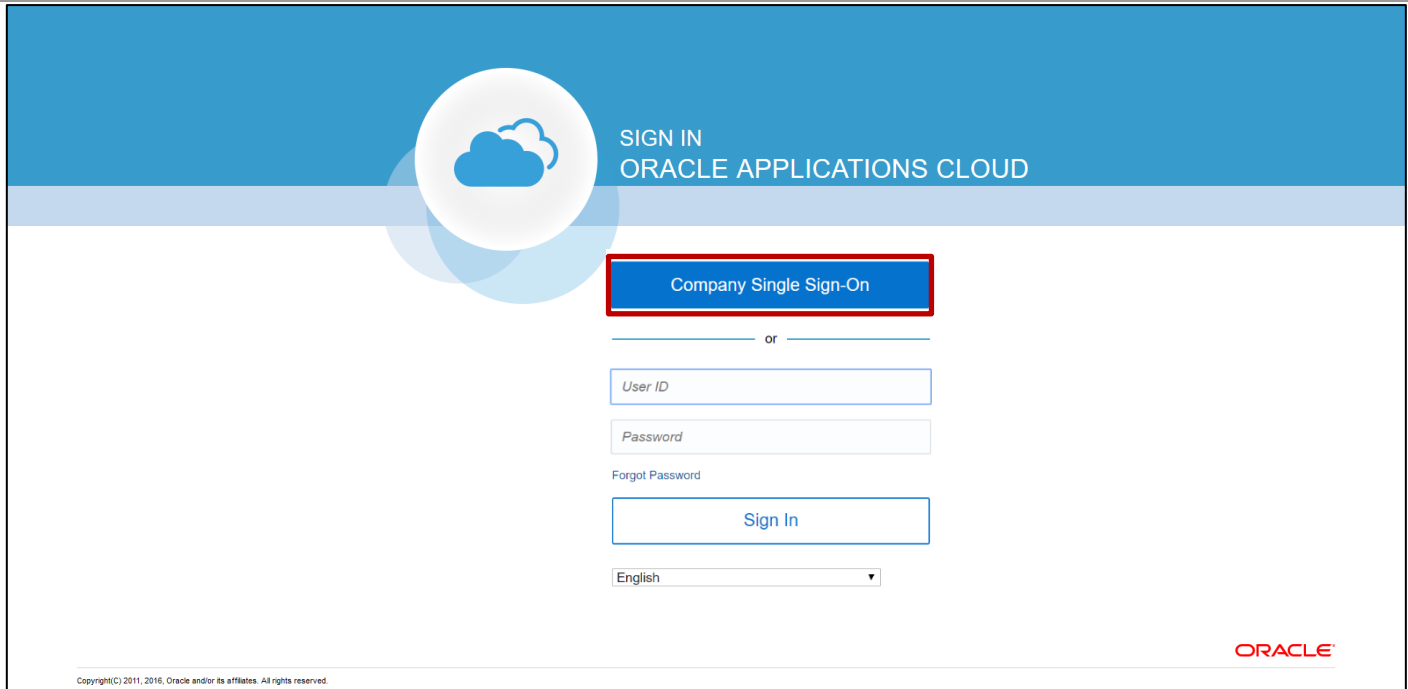
Navigation Summary: Sign in → Home Page → Notification (Bell) Icon 8

Note:

- You may observe many links / tabs on each screen, this User Manual only explains links / tabs relevant to the Performance workflow
- Attachments in the workflow can be made in any format. Word or Excel is preferable.
- All names / titles / data visible in the screenshot is test data. The objective of this User Manual is to explain the system workflows / processes in Performance Management.

 <p>1</p>	<p>This is the Navigator. You can navigate from here to the respective actions. The same tabs will be available on your home screen as well.</p>
 <p>2</p>	<p>Click here to go to the Home page.</p>
 <p>3</p>	<p>Click here to view all Notifications that require your attention.</p>
 <p>4</p>	<p>Click here to set your preferences and to Sign Out.</p>
 <p>5</p>	<p>As an Employee, click on 'Me' for Employee actions As a Line Manager, click on 'My Team' for your team related actions As an HR, click on 'My Client Groups' for HR related actions</p>
 <p>6</p>	<p>The text below the screen shot provides the explanation where applicable.</p>
 <p>7</p>	<p>These are the navigation steps (a., b., c., ...) that you need to follow to complete the process</p>
 <p>8</p>	<p>This is the navigation summary - a quick reference given at the end of the process to complete the workflow/process in the system</p>

2.1 Approval and Notifications

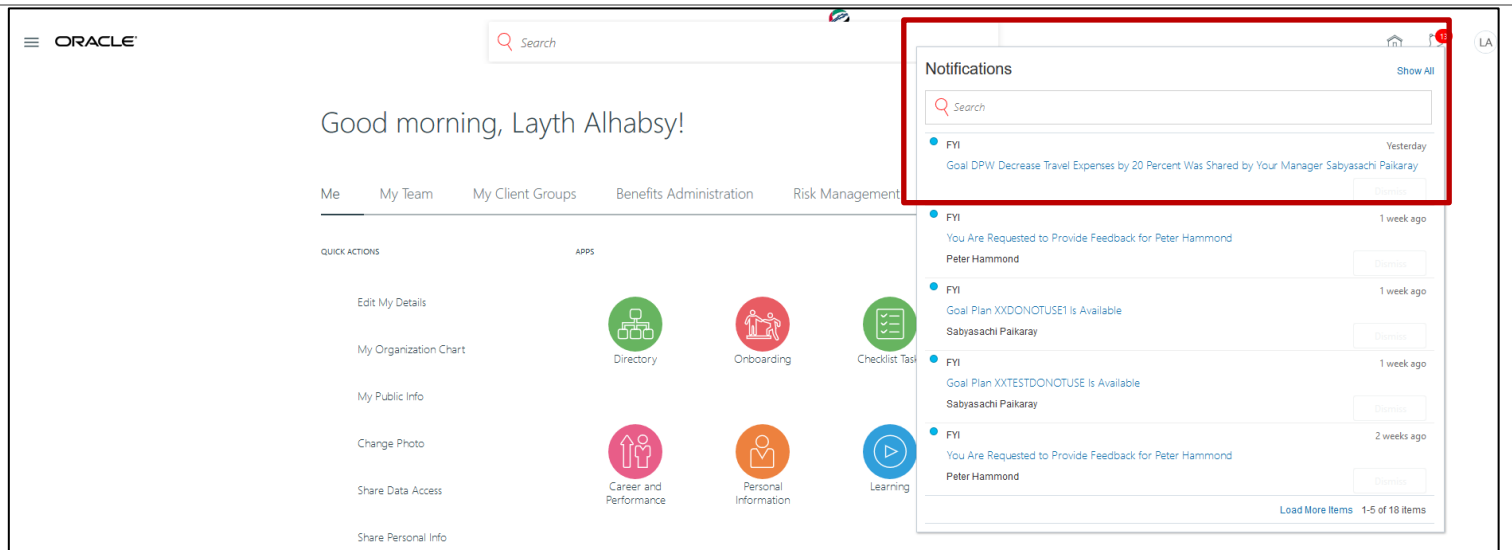


a) Click on 'Company Single Sign On' to login



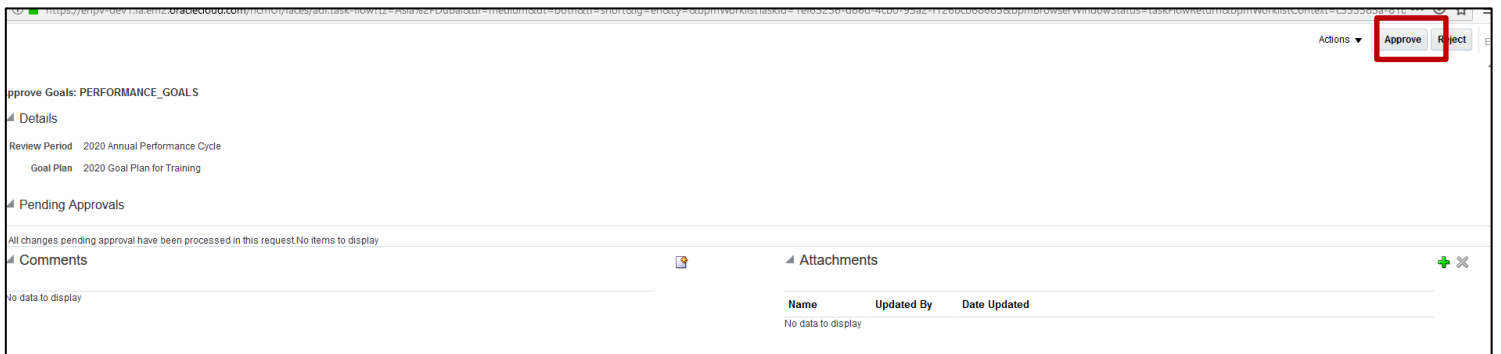
Explanation: This is your Home screen.

b) Click on Notification (Bell) Icon on the top right hand corner.



Explanation: This is your Notification section. You can get 'For Your Information (FYI)' Notifications and/or 'Action Required' Notifications

c) Click on the Notification to see the details

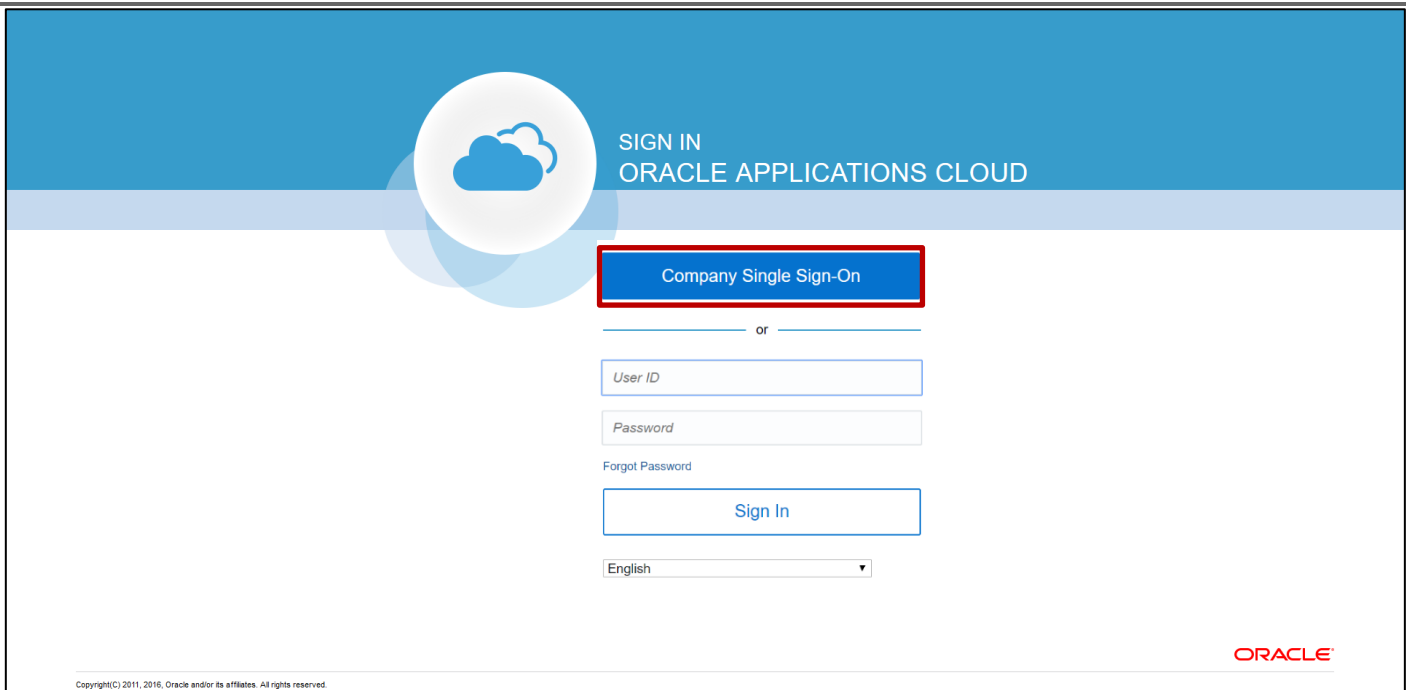


d) In case the Notification is for approval, you can click on the Approve / Reject button.

Navigation Summary:

Sign in --> Home Page --> Notification (Bell) Icon --> Read Notification --> Action if Required

2.2 Add Goals for an Employee



SIGN IN
ORACLE APPLICATIONS CLOUD

Company Single Sign-On

or

User ID

Password

Forgot Password

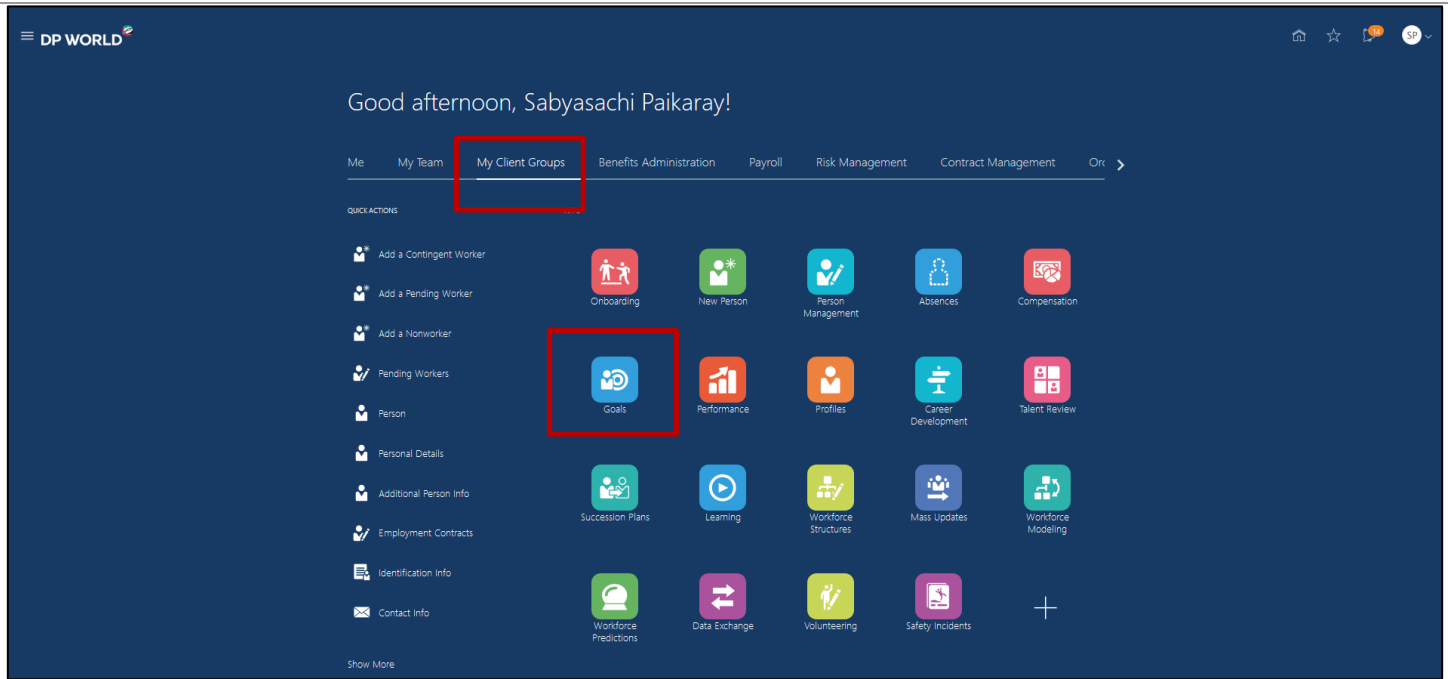
Sign In

English

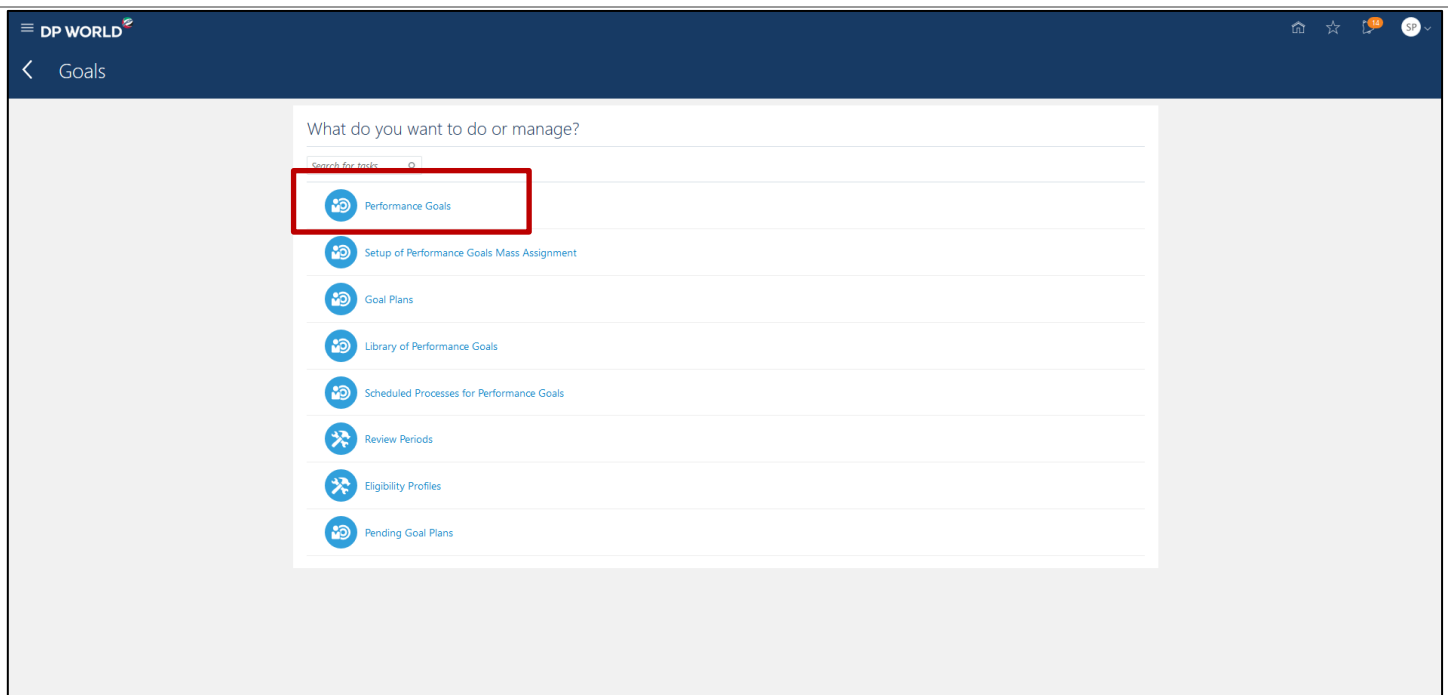
ORACLE

Copyright(C) 2011, 2016, Oracle and/or its affiliates. All rights reserved.

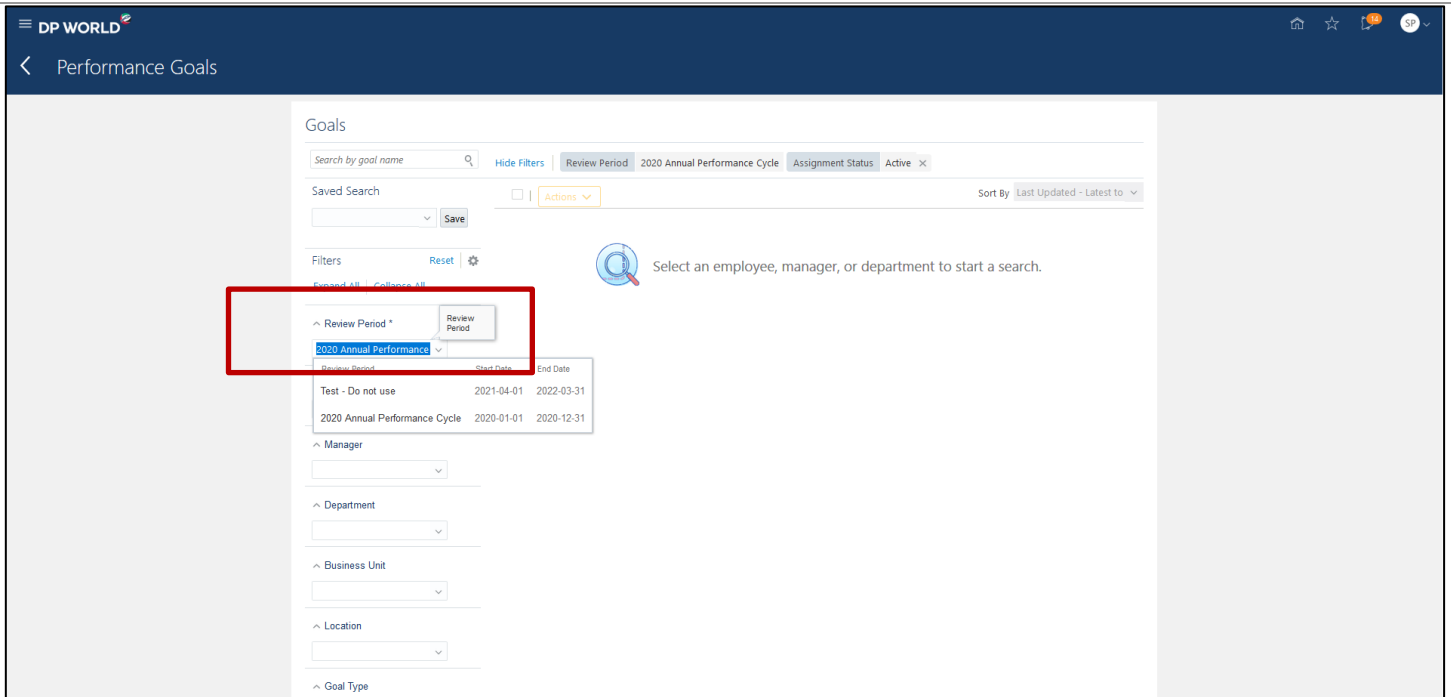
a) Click on 'Company Single Sign On' to login



b) Click on My Client Groups tab and then click on Goals

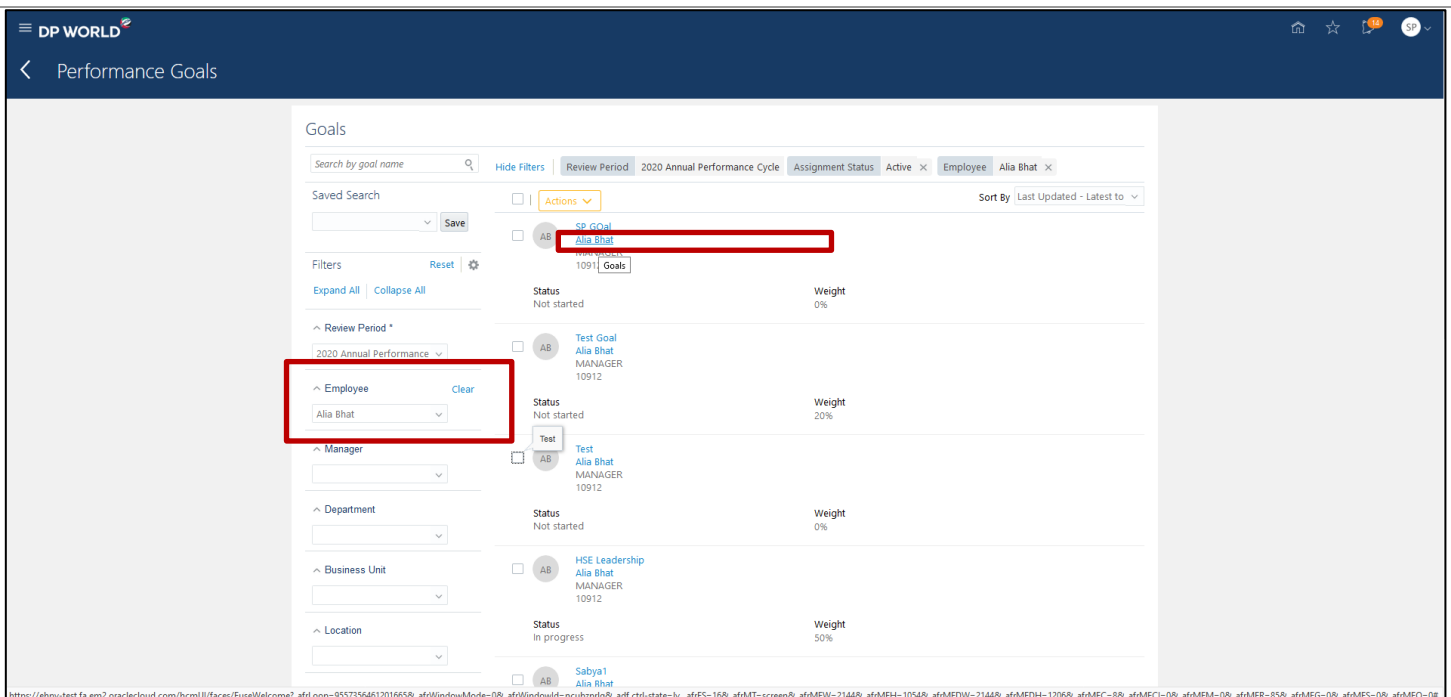


c) Click on Performance Goals



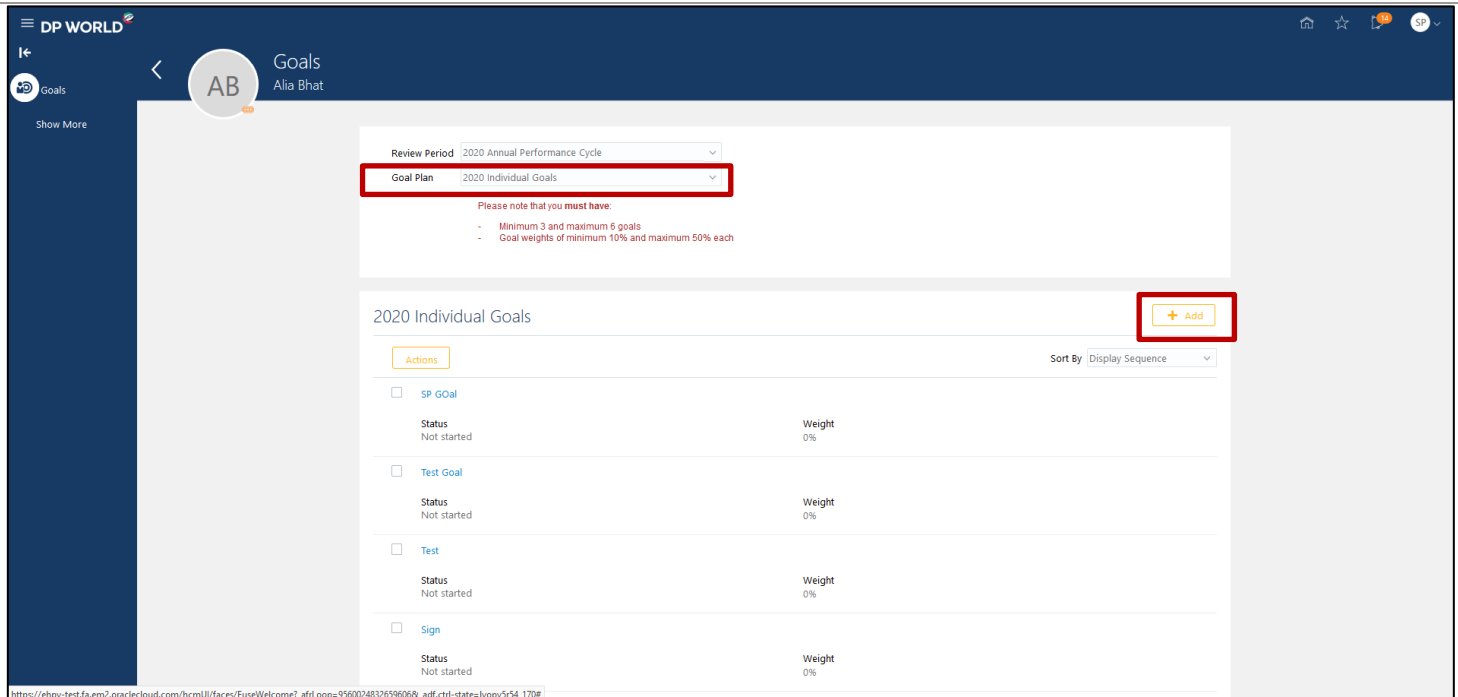
Explanation: There are variety of Filters are available for finding the goal data.

d) The first step for searching the goal document is to select the relevant Review Period. It is mandatory to select the Review Period.

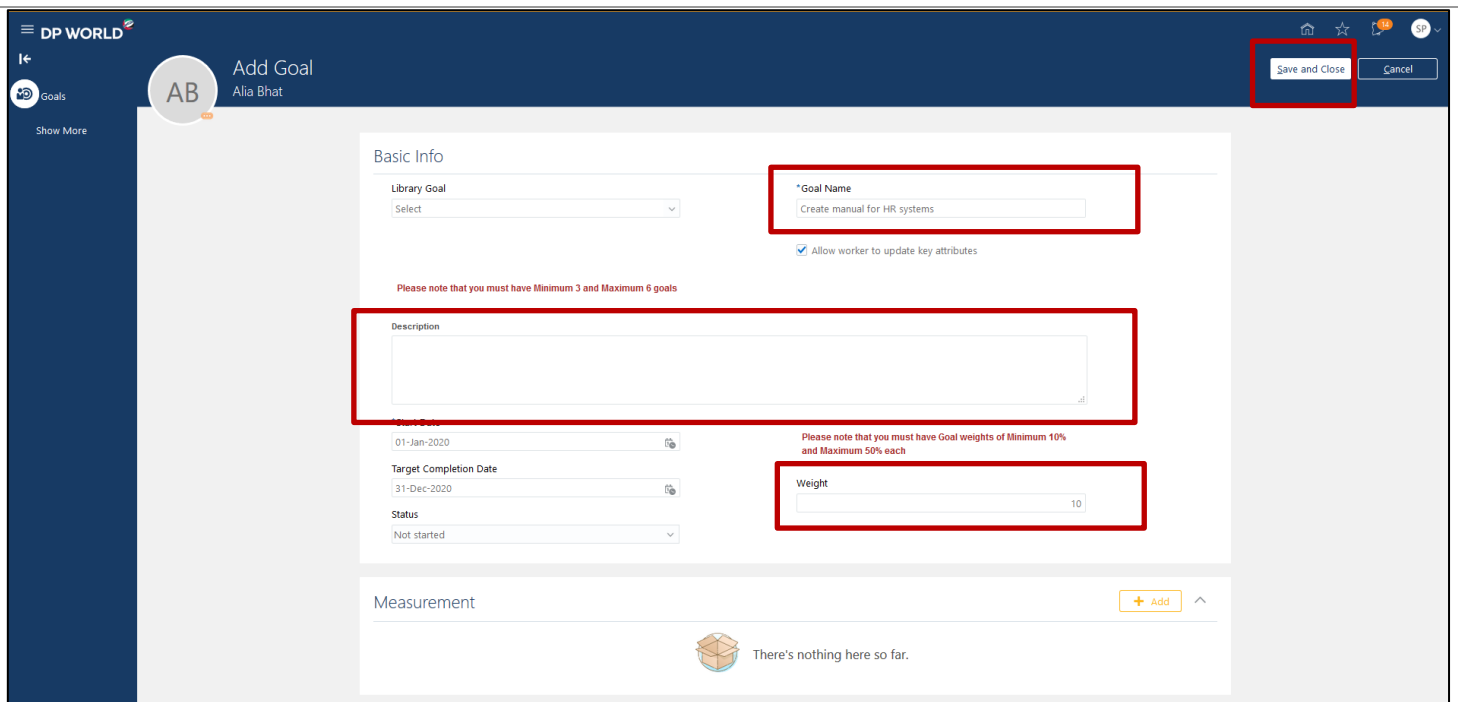


e) Next step is to type the employee first and/or last name and choose the relevant Employee. The page will populate the selected Employee's goals. (**Note:** This will provide the Employee's Regional, Functional and Individual goals. To view only Individual Goals, scroll down the filters on left side, under Goal Plan select the respective Individual Goal Plan. You can add only Individual Goals for an Employee, Regional and Functional Goals can be added only by CHR.)

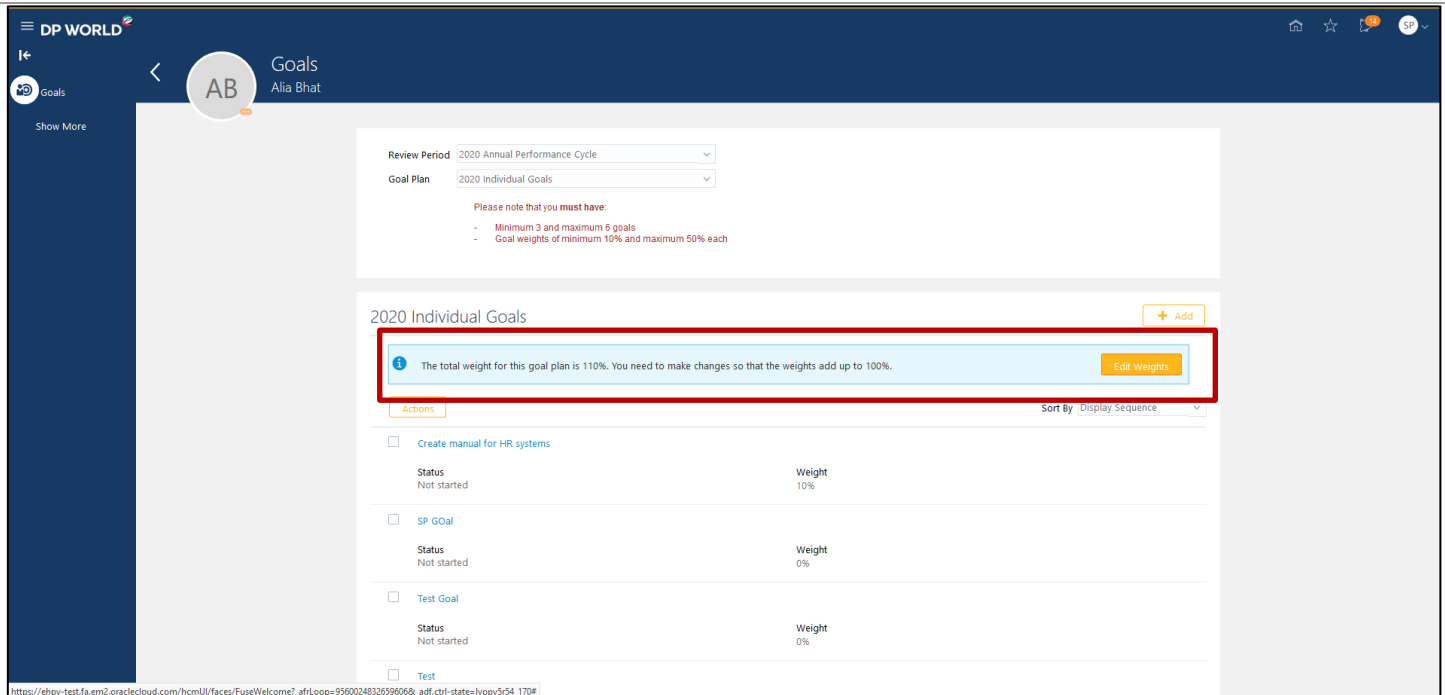
f) To add goals for the Employee, click on the the Employee Name link



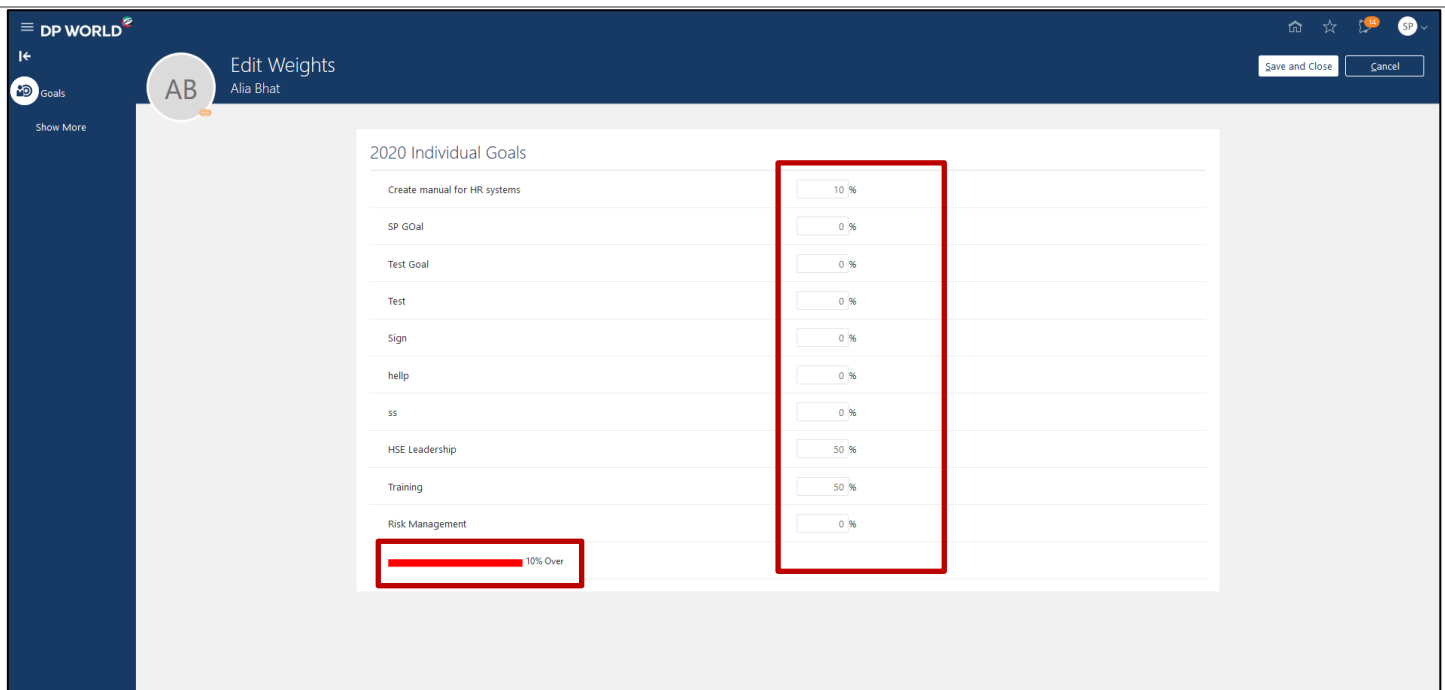
- g) This will open the selected Employee Goal Document page, Review Period will be auto populated, you will need to select the Goal Plan from the dropdown. Select Individual Goal Plan, then the Individual goals of the Employee get reflected on the page.
- h) To add goals, click on Add button



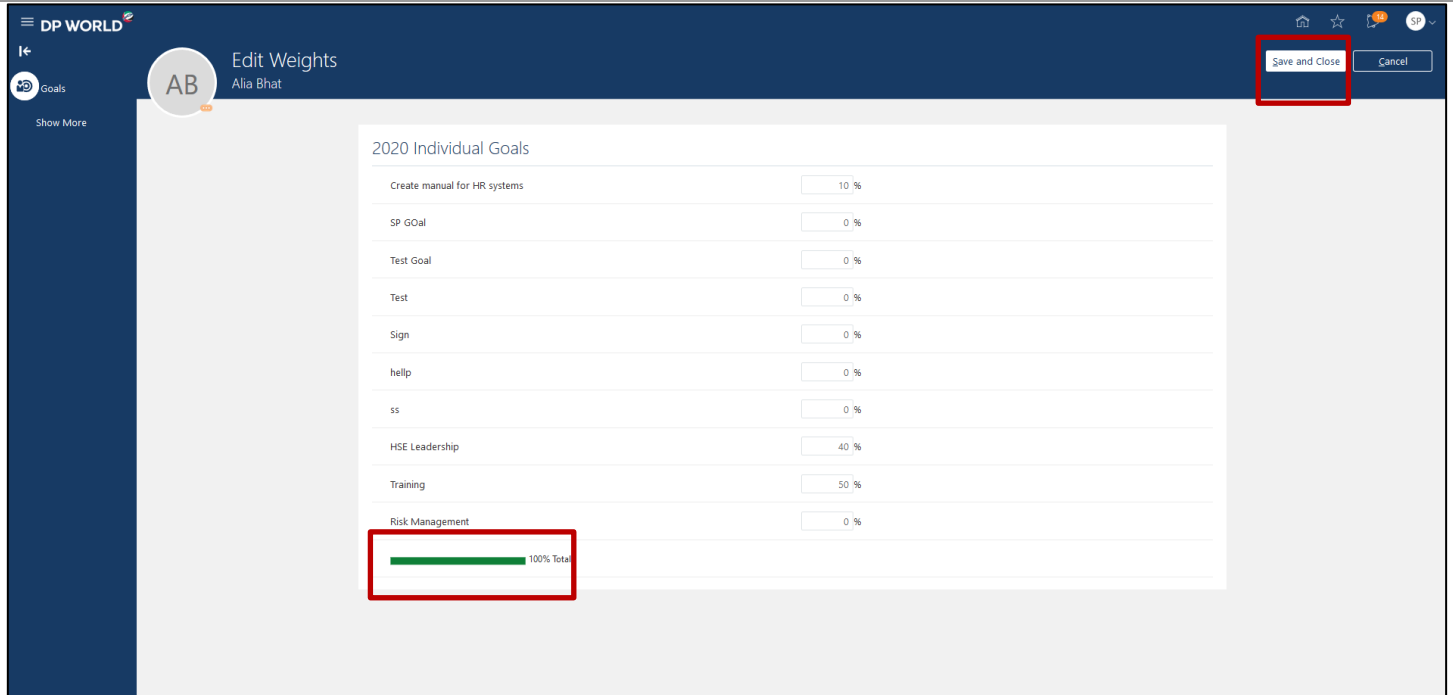
- i) Add Goal Name, Description and respective Goal Weight and then click on Save and Close



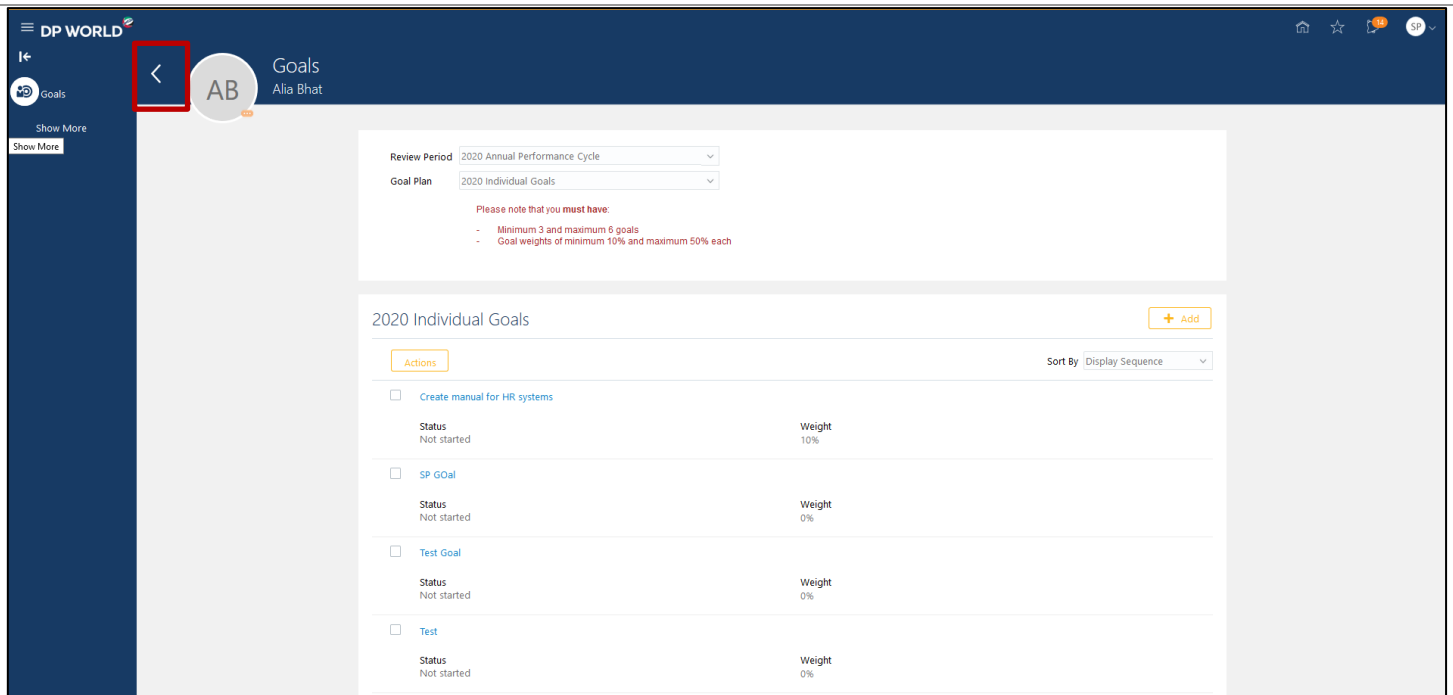
j) If the sum of all goal weights is not equal to 100%, you will receive an information alert as seen in the above screenshot to change the respective goal weights. Click on Edit Weights button to adjust the weights of the respective goals.



k) Adjust the goal weights till the sum of goal weights is equal to 100. You can notice the delta weight at the bottom of the screen and the bar will be in red colour if sum of goal weights is not equal to 100%.



l) Click on Save and Close when you see the Sum of Goal Weights bar is in Green Colour.

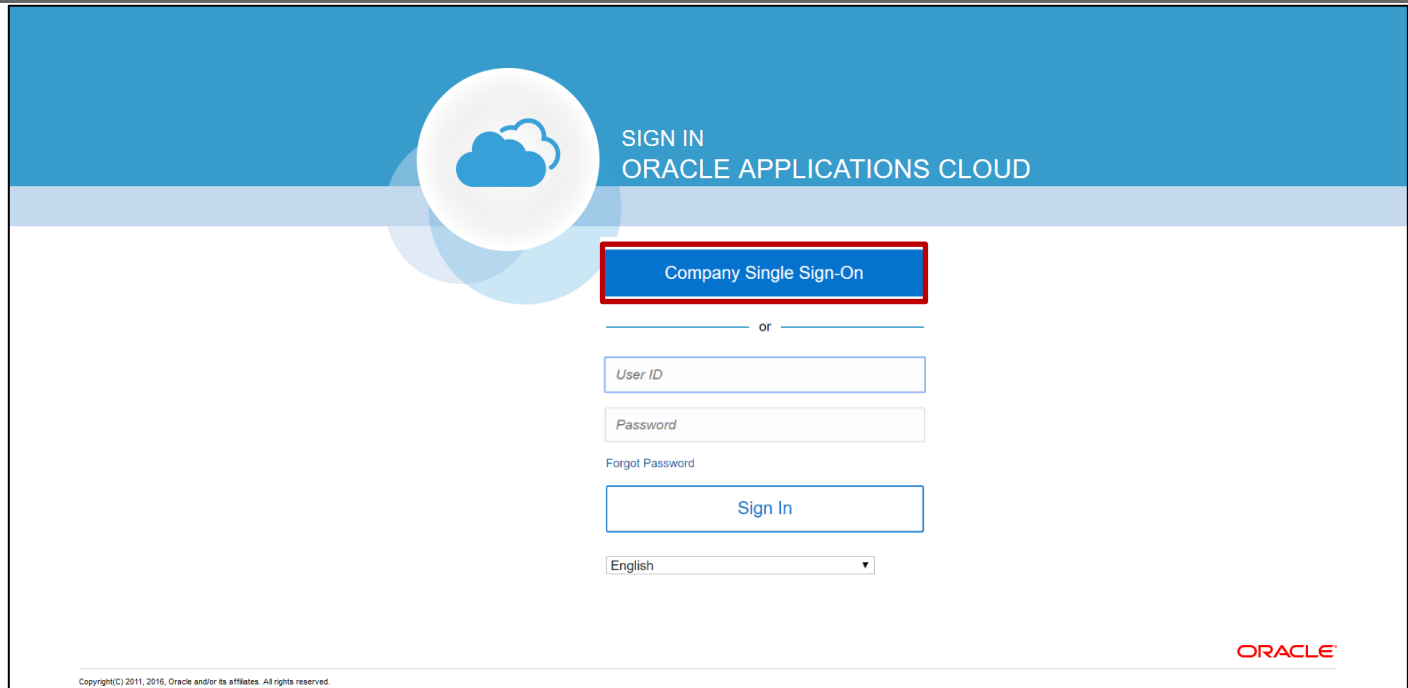


m) Click on Done arrow to go back to Search Goals page

Navigation Summary:

Sign in --> Home Page --> My Client Groups --> Goals --> Performance Goals --> Select Review Period --> Type Employee First Name Last Name --> Select the Employee --> Click on Employee Name Link --> Select Goal Plan --> Click on Add Goals --> Add Goal Name and relevant weight --> Save and Close

2.3 Search Goals assigned to an Employee and Edit them



SIGN IN
ORACLE APPLICATIONS CLOUD

Company Single Sign-On

or

User ID

Password

Forgot Password

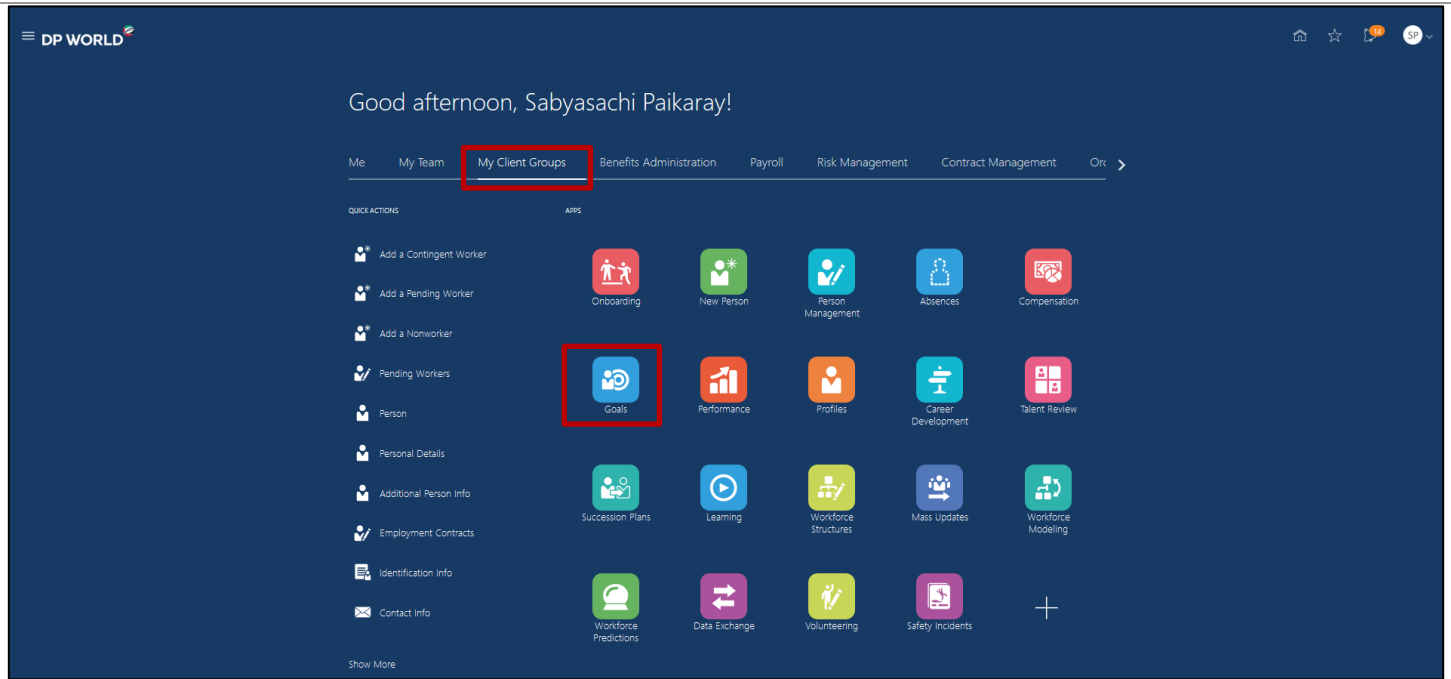
Sign In

English

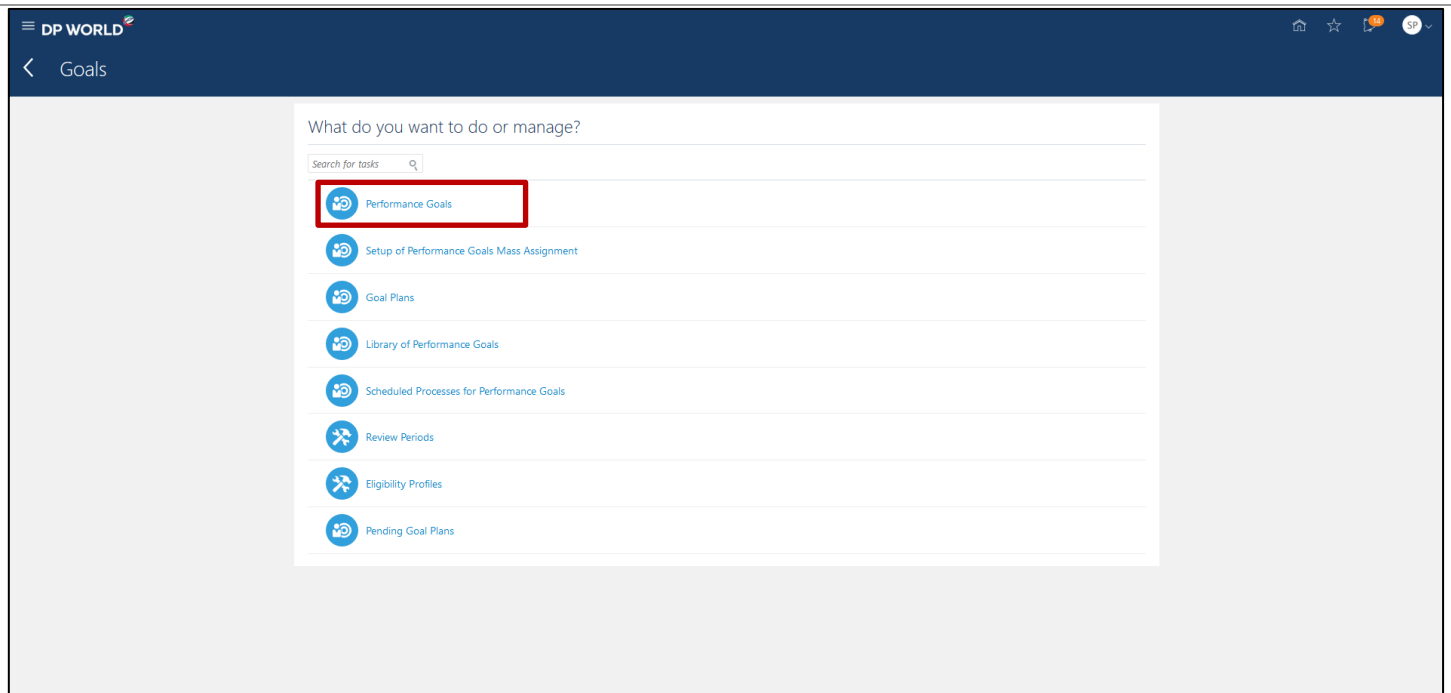
ORACLE

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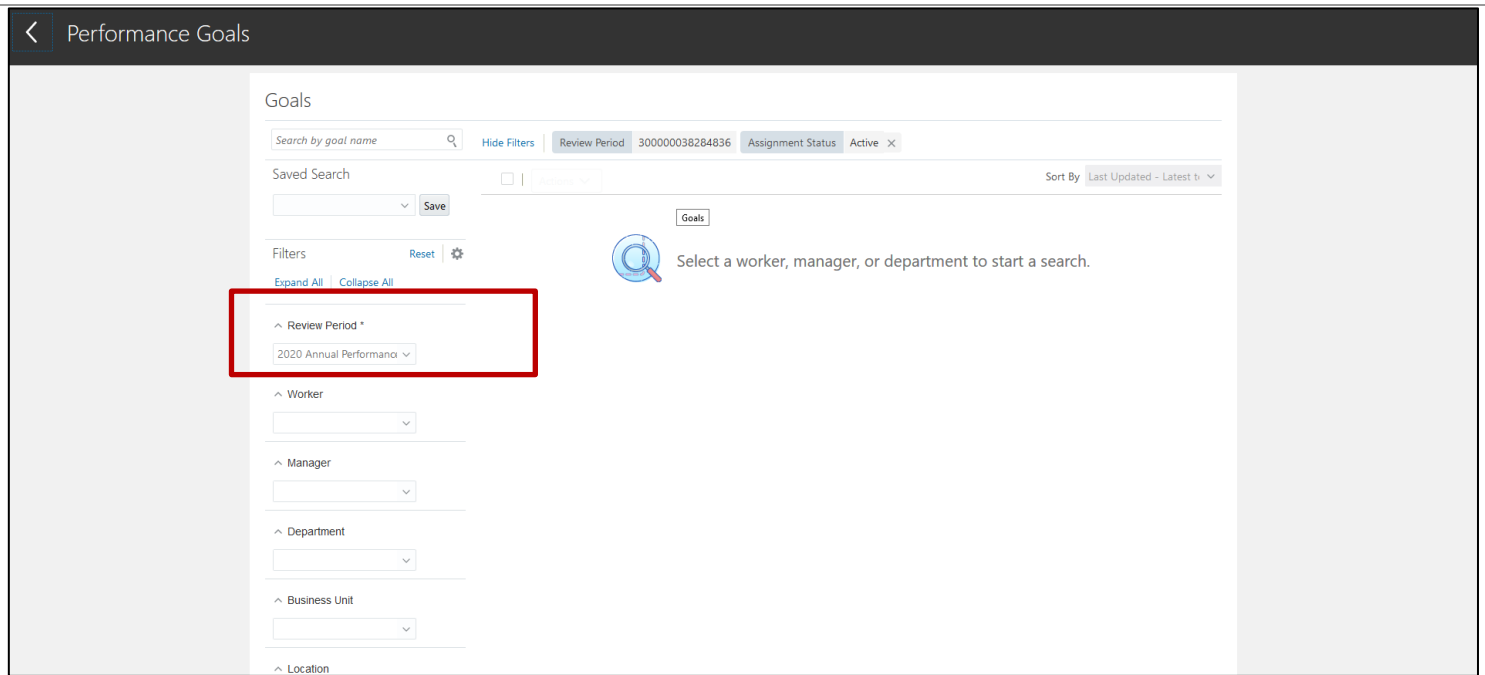
a) Click on 'Company Single Sign On' to login



b) Click on My Client Groups tab and then click on Goals

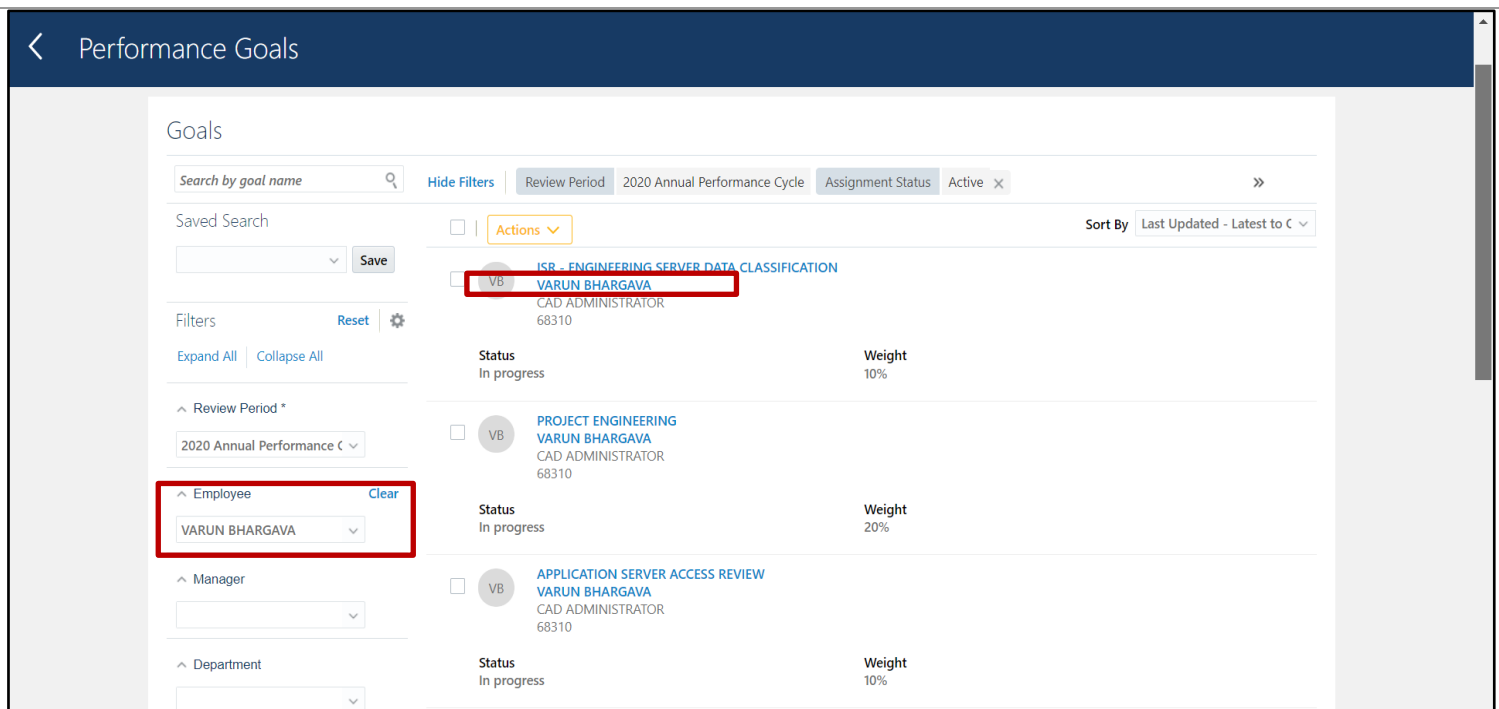


c) Click on Performance Goals



Explanation: There are variety of Filters are available for finding the goal data.

d) The first step for searching the goal document is to select the relevant Review Period. It is mandatory to select the Review Period.



e) Next step is to type the employee first and/or last name and choose the relevant Employee. The page will populate the selected Employee's goals. (**Note:** This will provide the Employee's Regional, Functional and Individual goals. To view only Individual Goals, scroll down the filters on left side, under Goal Plan select the respective Individual Goal Plan.)

f) To edit goals for the Employee, click on the Employee Name Link you would like to edit

Goals
Show More

VB VARUN BHARGAVA

Review Period: 2020 Annual Performance Cycle

Goal Plan: 2020 Individual Goals

Please note that you **must have**

- Minimum 3 and maximum 6 goals
- Goal weights of minimum 10% and maximum 50% each

2020 Individual Goals + Add

Actions Sort By: Display Sequence

<input type="checkbox"/>	Copy - PROJECT ENGINEERING - 123	Status: In progress	Weight: 0%
<input type="checkbox"/>	ISR - ENGINEERING SERVER DATA CLASSIFICATION	Status: In progress	Weight: 30%

g) This will open the selected Employee Goal Document page, Review Period will be auto populated, you will need to select the Goal Plan from the dropdown. Select Individual Goal Plan, then the Individual goals of the Employee get reflected on the page.

h) Click on the Goal Name Link that needs to be edited

Goals
Show More

VB VARUN BHARGAVA

ISR - ENGINEERING SERVER DATA CLASSIFICATION

Basic Info Edit

Goal Name: ISR - ENGINEERING SERVER DATA CLASSIFICATION

Status: In progress

Start Date: 01-Jan-2020

Weight: 30%

Target Completion Date: 31-Dec-2020

Source: Employee

Last Update: JASMINE SIRISH PAREKH 31-May-2020

Measurement + Add

There's nothing here so far.

i) Click on Edit button

PROJECT ENGINEERING - 123
VARUN BHARGAVA

Basic Info

*Goal Name
PROJECT ENGINEERING - 123

Description

*Start Date
01-Jan-2020

Target Completion Date
31-Dec-2020

Status
In progress

Weight
20

Save Cancel

Measurement

j) Make the required edits to the goal and then Click on Save button

ISR - ENGINEERING SERVER DATA CLASSIFICATION
VARUN BHARGAVA

Basic Info

Goal Name
ISR - ENGINEERING SERVER DATA CLASSIFICATION

Status
In progress

Start Date
01-Jan-2020

Weight
30%

Target Completion Date
31-Dec-2020

Source
Employee

Last Update
JASMINE SIRISH PAREKH 31-May-2020

Measurement

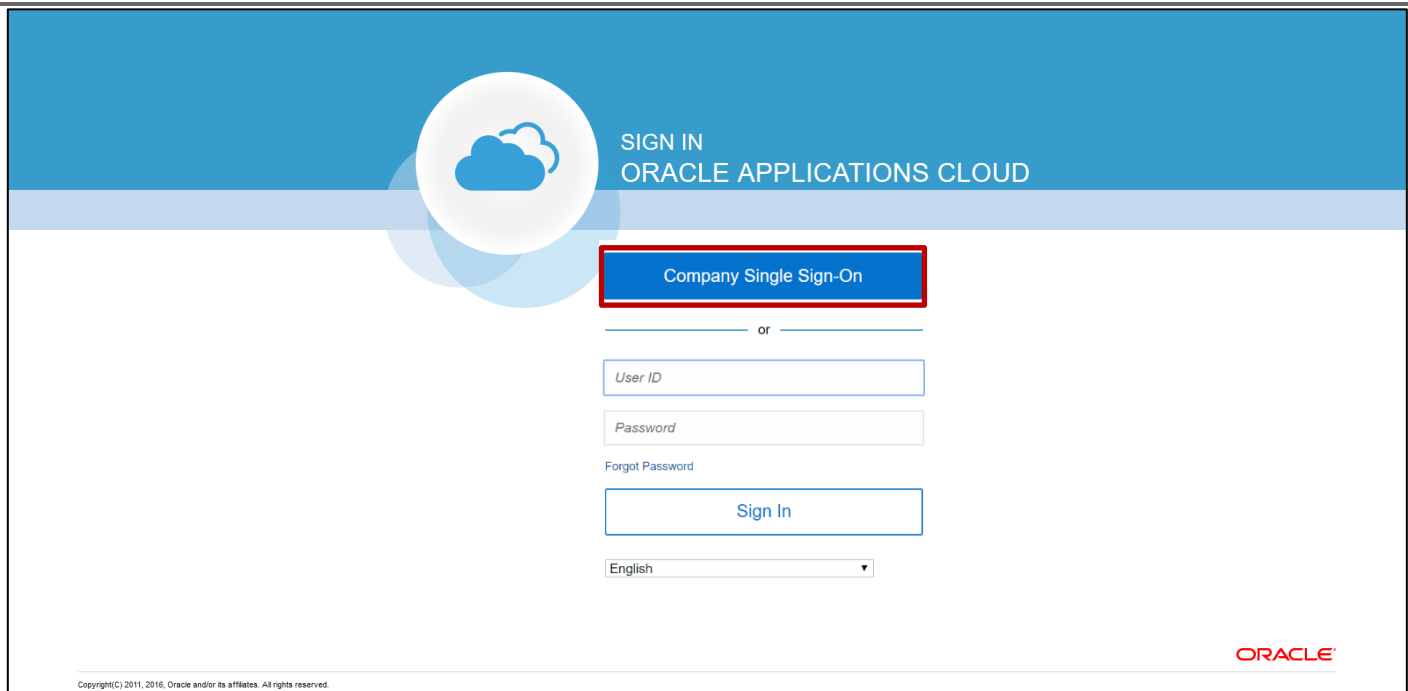
There's nothing here so far.

k) Click on the Done arrow to go back to the search goals page.

Navigation Summary:

Sign in --> Home Page --> My Client Groups --> Goals --> Performance Goals --> Select Review Period -
-> Type Employee First Name Last Name --> Select the Employee --> Click on Employee Name Link -->
Select Goal Plan --> Click on Employee Name Link --> Click on Edit --> Edit Required details --> Save -->
Done arrow to go back to Search Goals page

2.4 Cancel Goals for an Employee



SIGN IN
ORACLE APPLICATIONS CLOUD

Company Single Sign-On

or

User ID

Password

Forgot Password

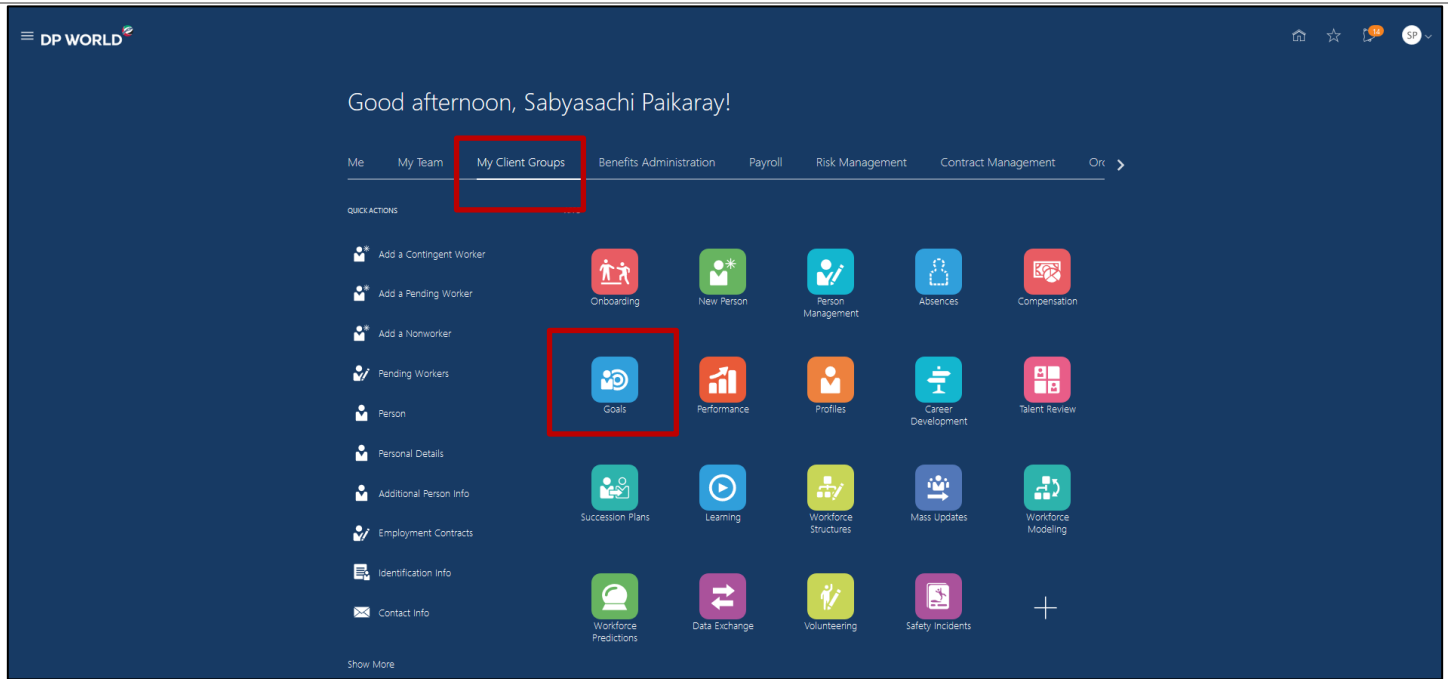
Sign In

English

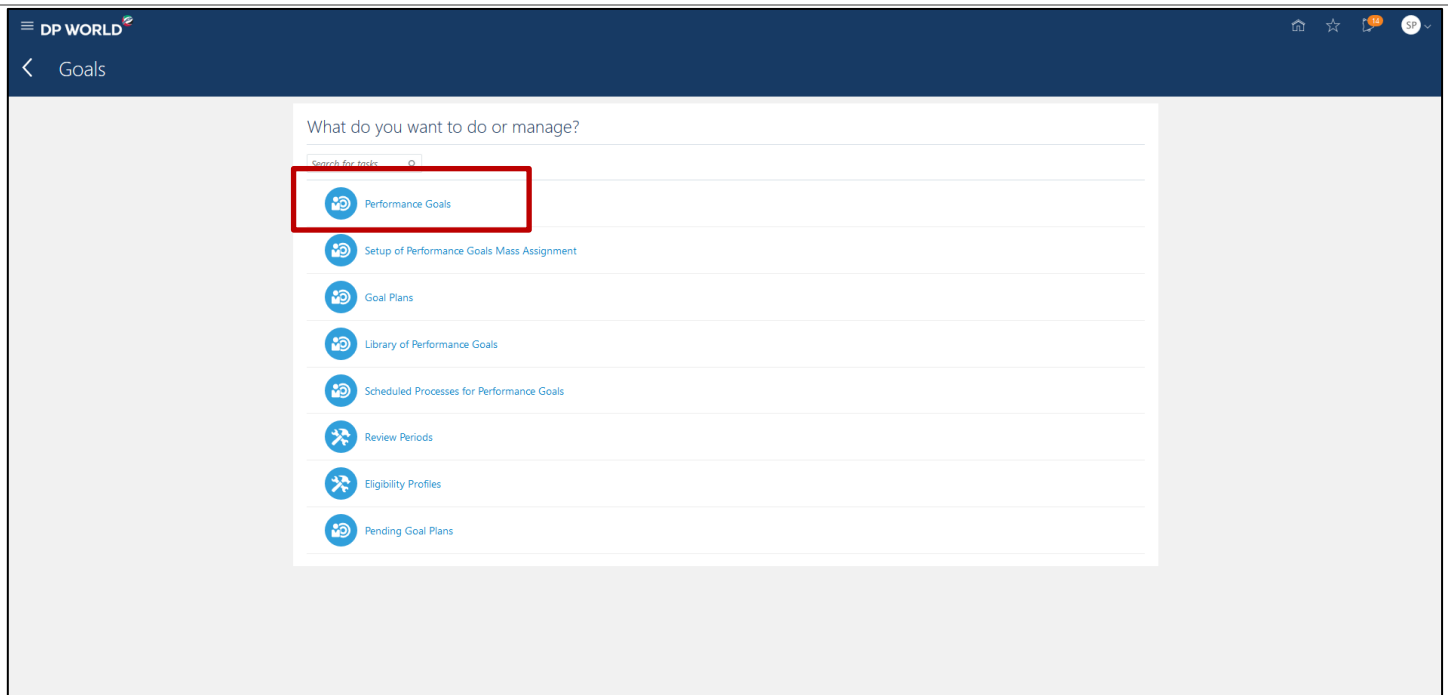
ORACLE

Copyright(C) 2011, 2016, Oracle and/or its affiliates. All rights reserved.

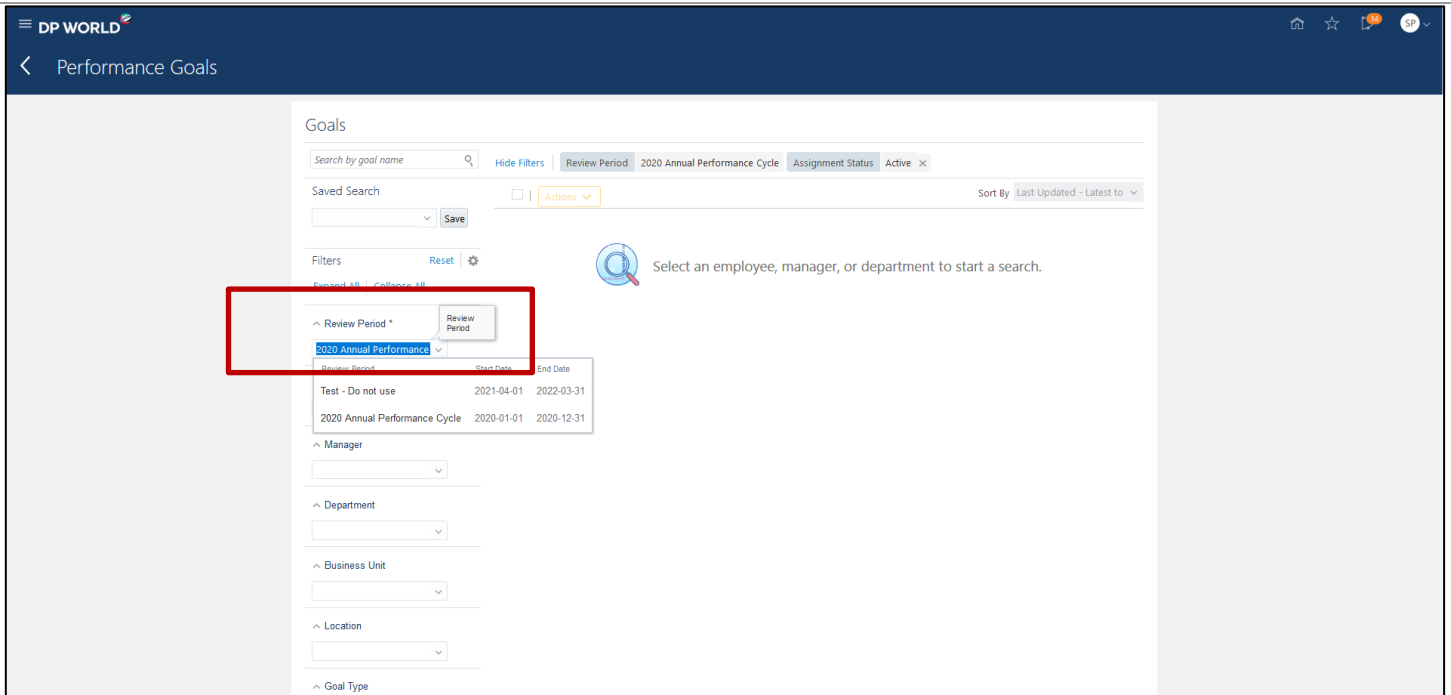
a) Click on 'Company Single Sign On' to login



b) Click on My Client Groups tab and then click on Goals

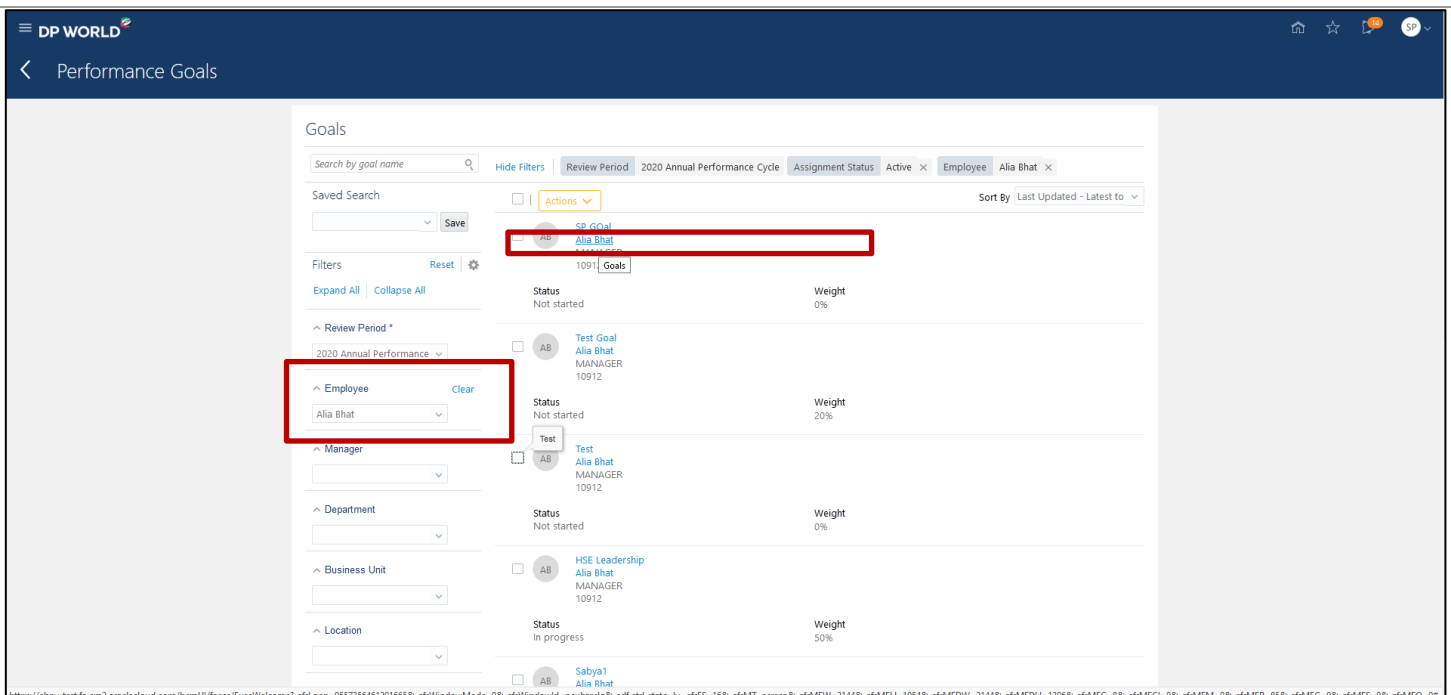


c) Click on Performance Goals



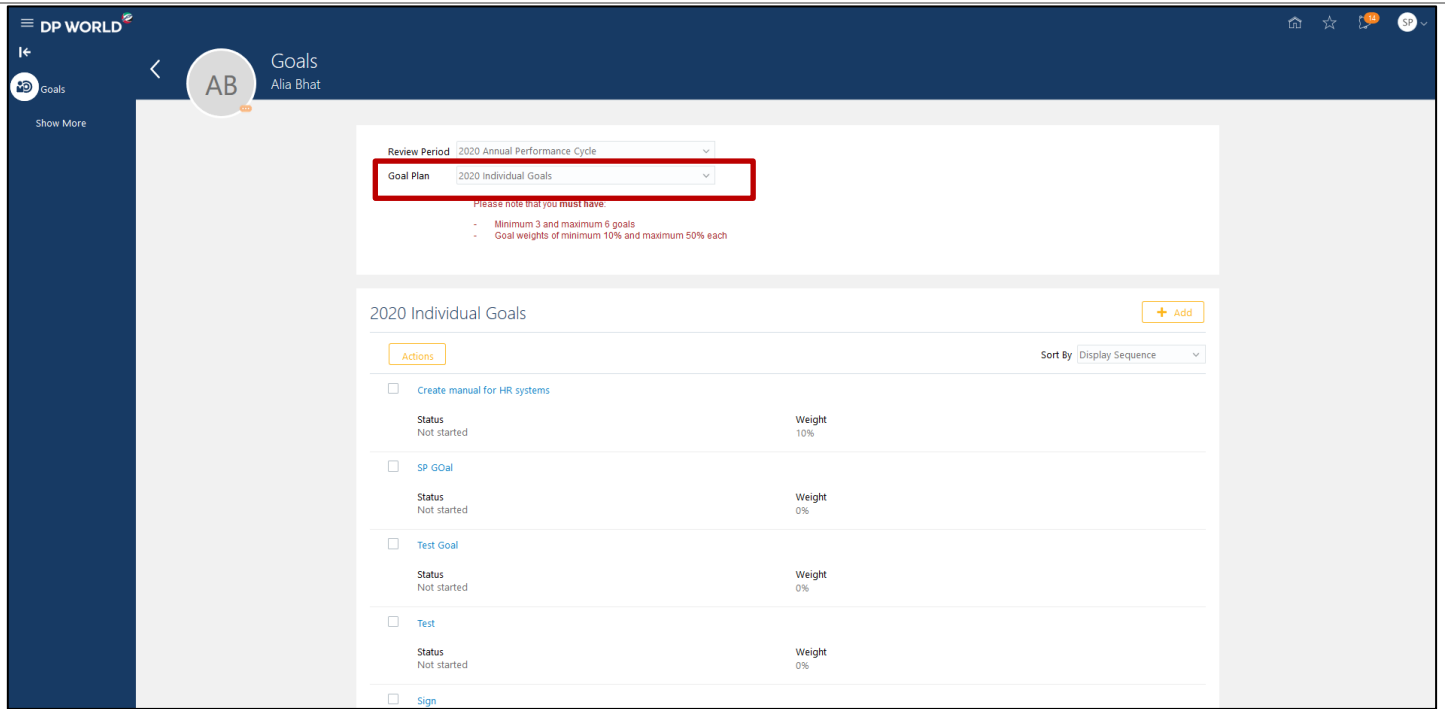
Explanation: There are variety of Filters are available for finding the goal data.

d) The first step for searching the goal document is to select the relevant Review Period. It is mandatory to select the Review Period.

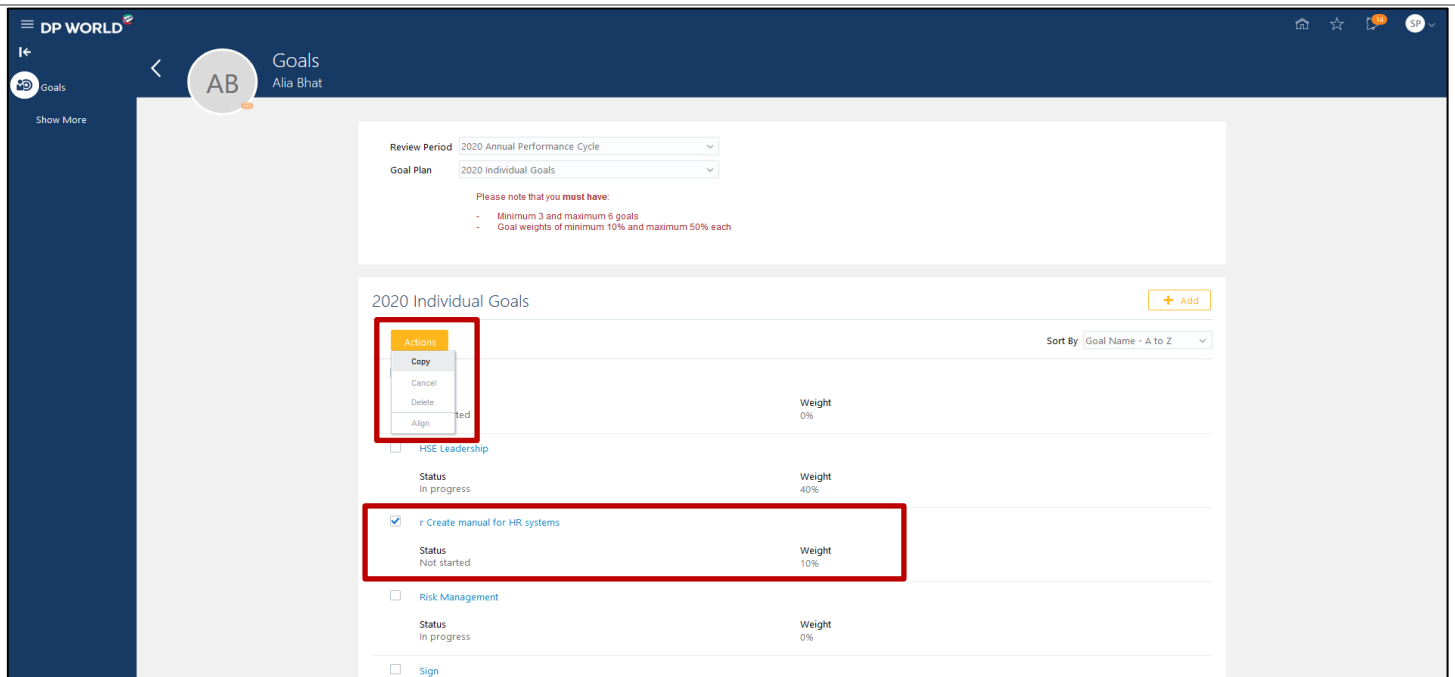


e) Next step is to type the employee first and/or last name and choose the relevant Employee. The page will populate the selected Employee's goals. (**Note:** This will provide the Employee's Regional, Functional and Individual goals. To view only Individual Goals, scroll down the filters on left side, under Goal Plan select the respective Individual Goal Plan.)

f) To cancel goals for the Employee, click on the the Employee Name link

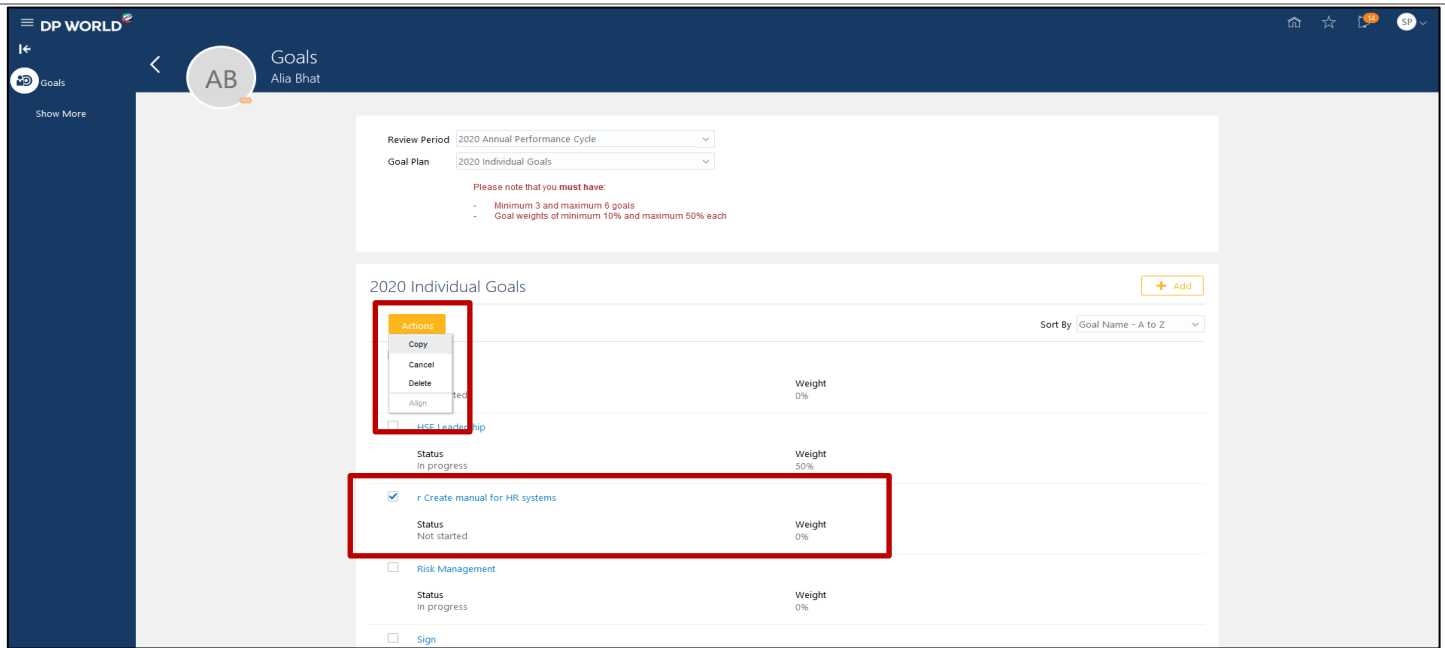


g) This will open the selected Employee Goal Document page, Review Period will be auto populated, you will need to select the Goal Plan from the dropdown. Select Individual Goal Plan, then the Individual goals of the Employee get reflected on the page.

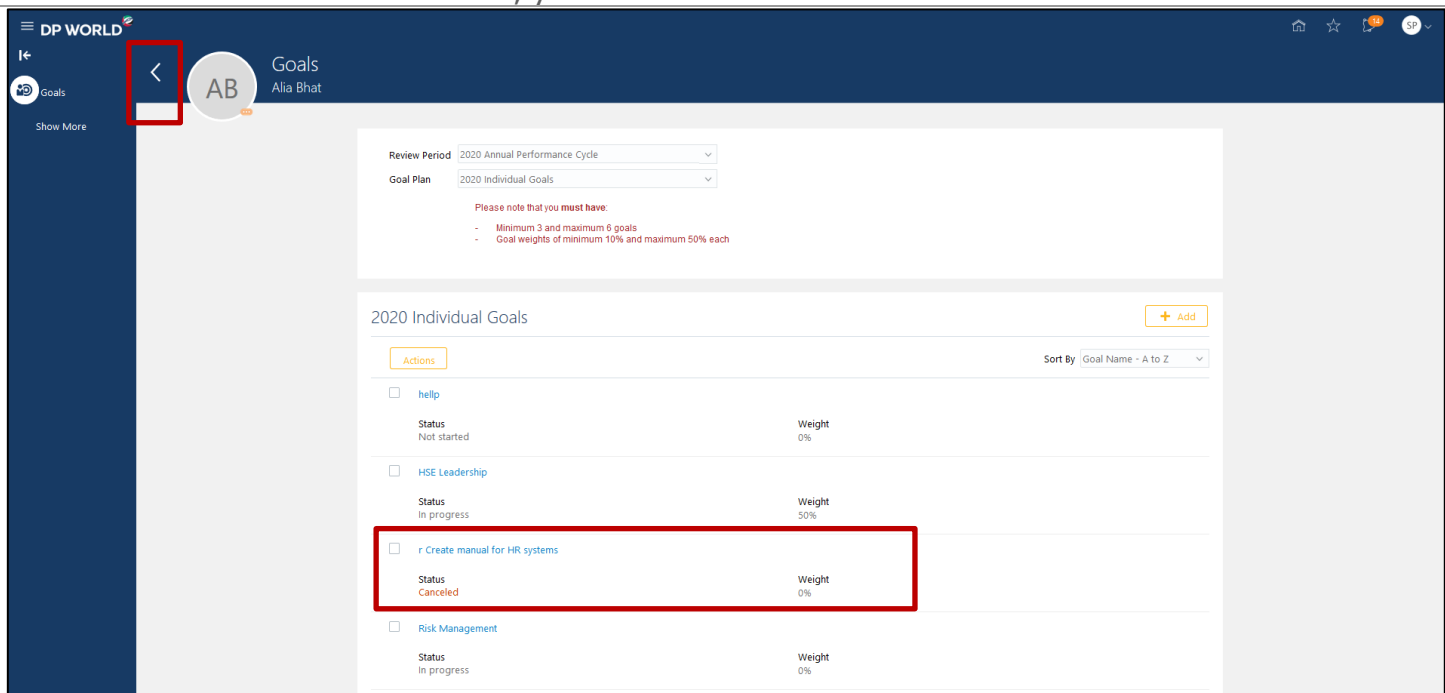


Explanation: You can only cancel goals that are added by HR specialist for the Employee, you cannot cancel goals added by Line Manager / Employee. The system will not allow you to cancel goals that are migrated to the Performance Document.

h) Once you select the Individual Goal added by HR specialist, click on Actions, you will see that the cancel tab is disabled. (Cancel tab will be enabled in Actions Tab only if you edit the weight of the Individual Goal to 0. You may have to modify the weights of the other goals as well to ensure that the sum of goal weights is equal to 100%).



i) After you update the goal weight to 0, If you select the Individual Goal added by HR Specialist, then click on the Actions tab, you will be able to select cancel from the Actions list.

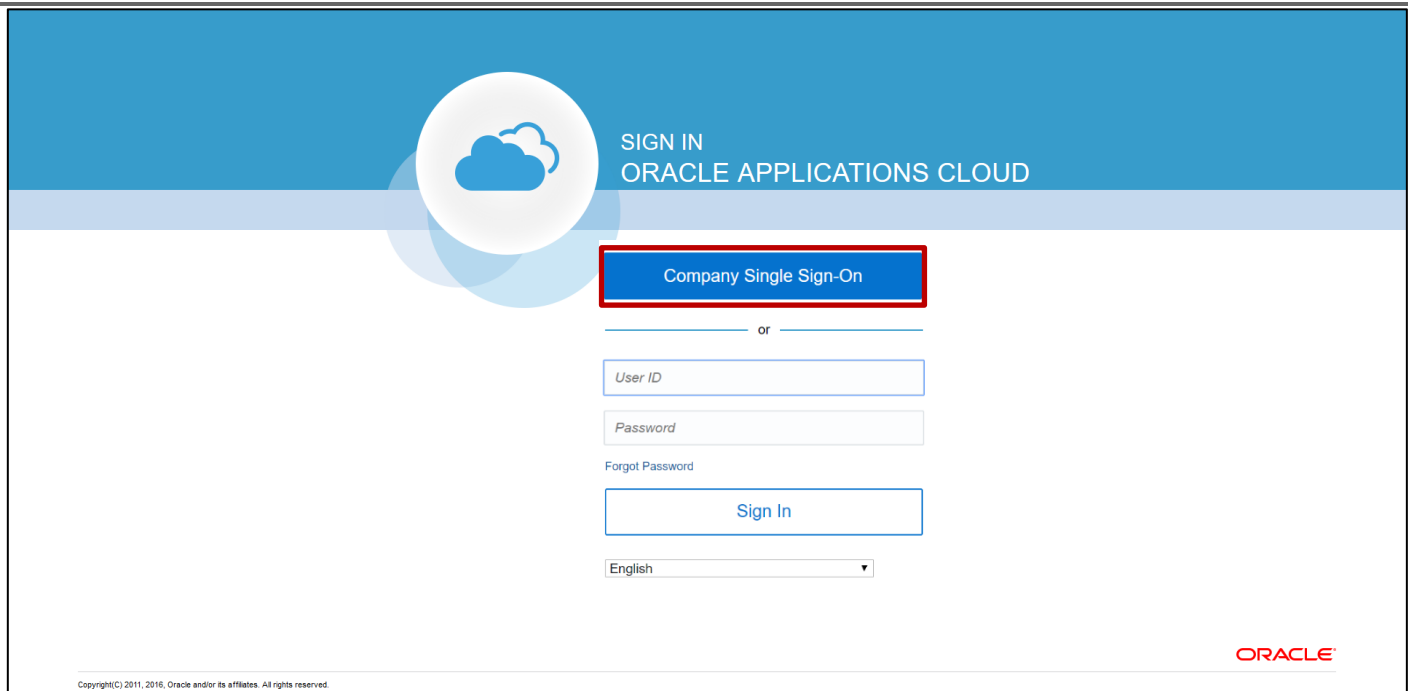


j) Once the goal is cancelled, you can see the status of the goal as canceled.
 k) Click on the Done arrow to go back to the search goals page.

Navigation Summary:

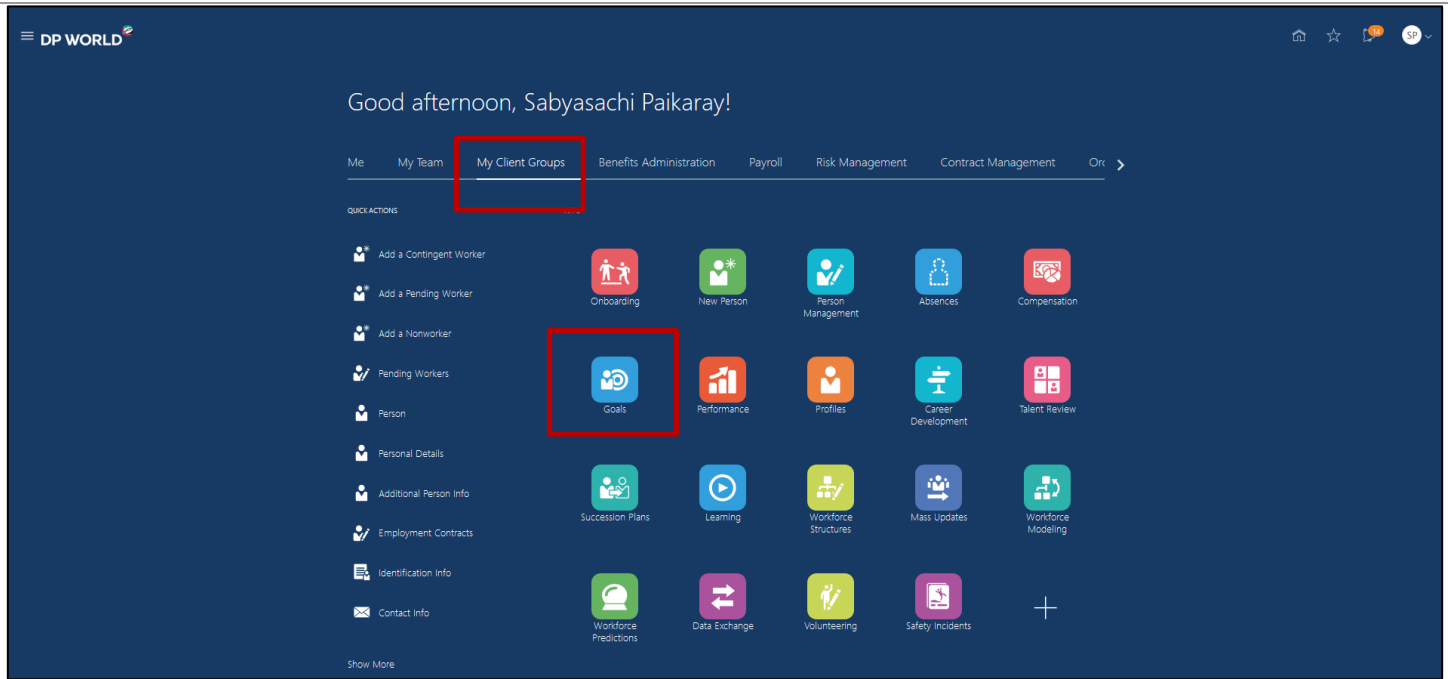
Sign in --> Home Page --> My Client Groups --> Goals --> Performance Goals --> Select Review Period --> Type Employee First Name Last Name --> Select the Employee --> Click on Employee Name Link --> Select Goal Plan --> Select Individual Goal to be Cancelled --> Edit Goal Weight to 0 --> Save --> Click on Done arrow to go back to Goals Page --> Select Individual Goal to be Cancelled --> Click on Actions --> Select Cancel --> Check updated Goal status

2.5 Delete Goals for an Employee

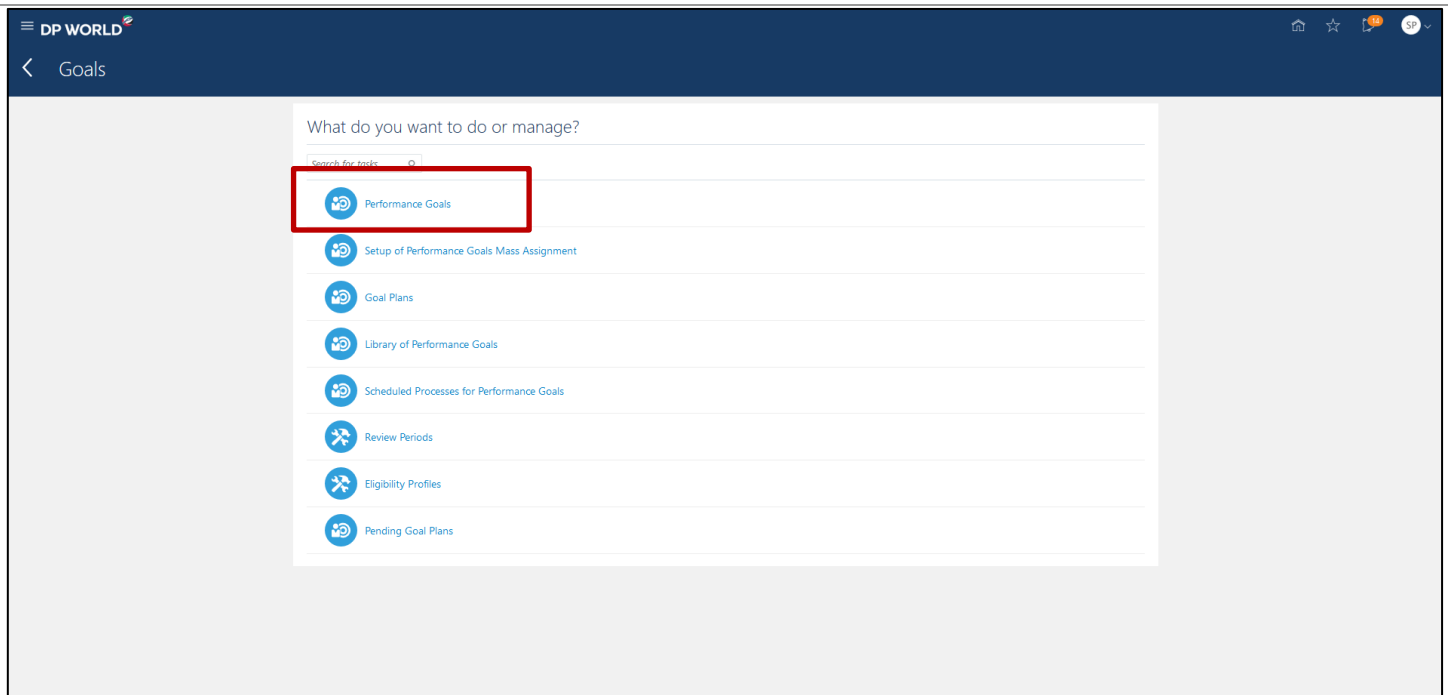


The screenshot shows the Oracle Applications Cloud sign-in interface. At the top, there is a blue header with a cloud icon and the text "SIGN IN ORACLE APPLICATIONS CLOUD". Below this, a blue button labeled "Company Single Sign-On" is highlighted with a red border. Underneath the button, there is a horizontal line with the word "or" in the center. Below the line are two input fields: "User ID" and "Password". There is a link for "Forgot Password" below the password field. A "Sign In" button is located below the input fields. At the bottom left, there is a language dropdown menu currently set to "English". The Oracle logo is in the bottom right corner. A small copyright notice is visible at the bottom left of the page: "Copyright(C) 2011, 2016, Oracle and/or its affiliates. All rights reserved."

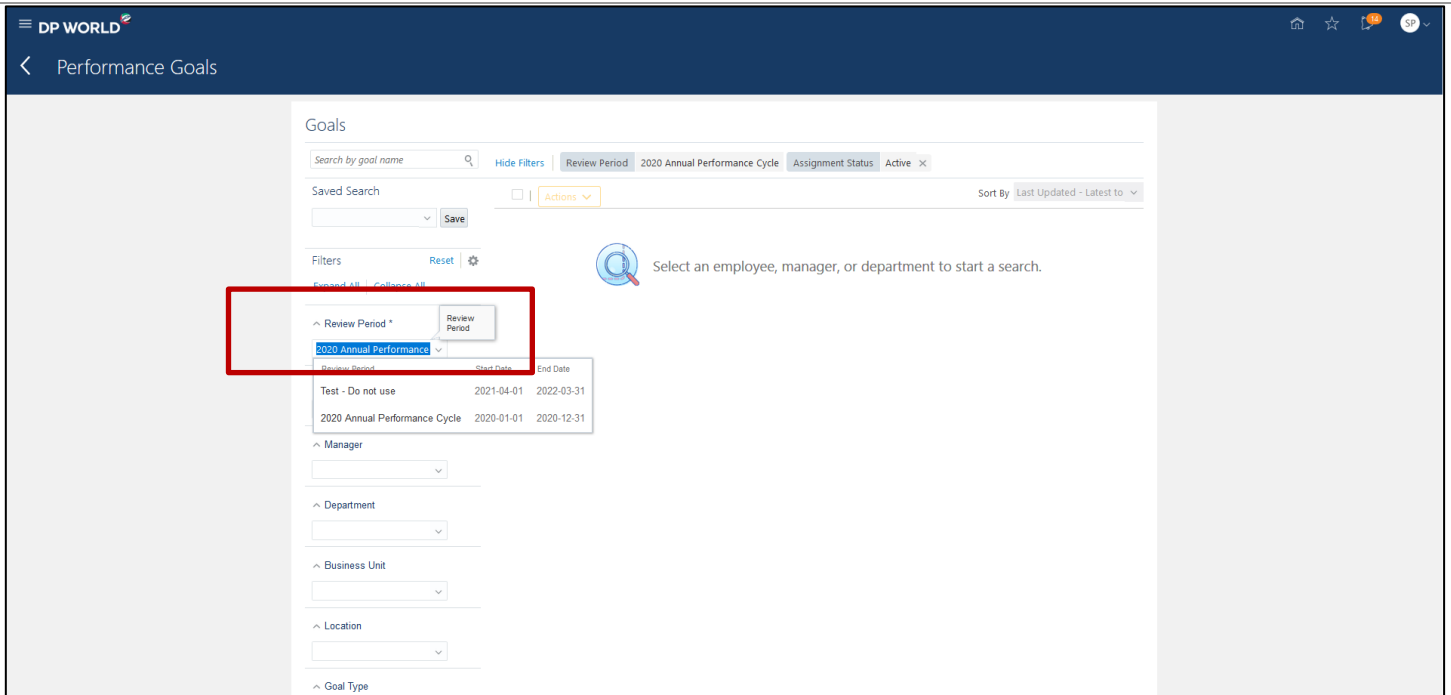
a) Click on 'Company Single Sign On' to login



b) Click on My Client Groups tab and then click on Goals

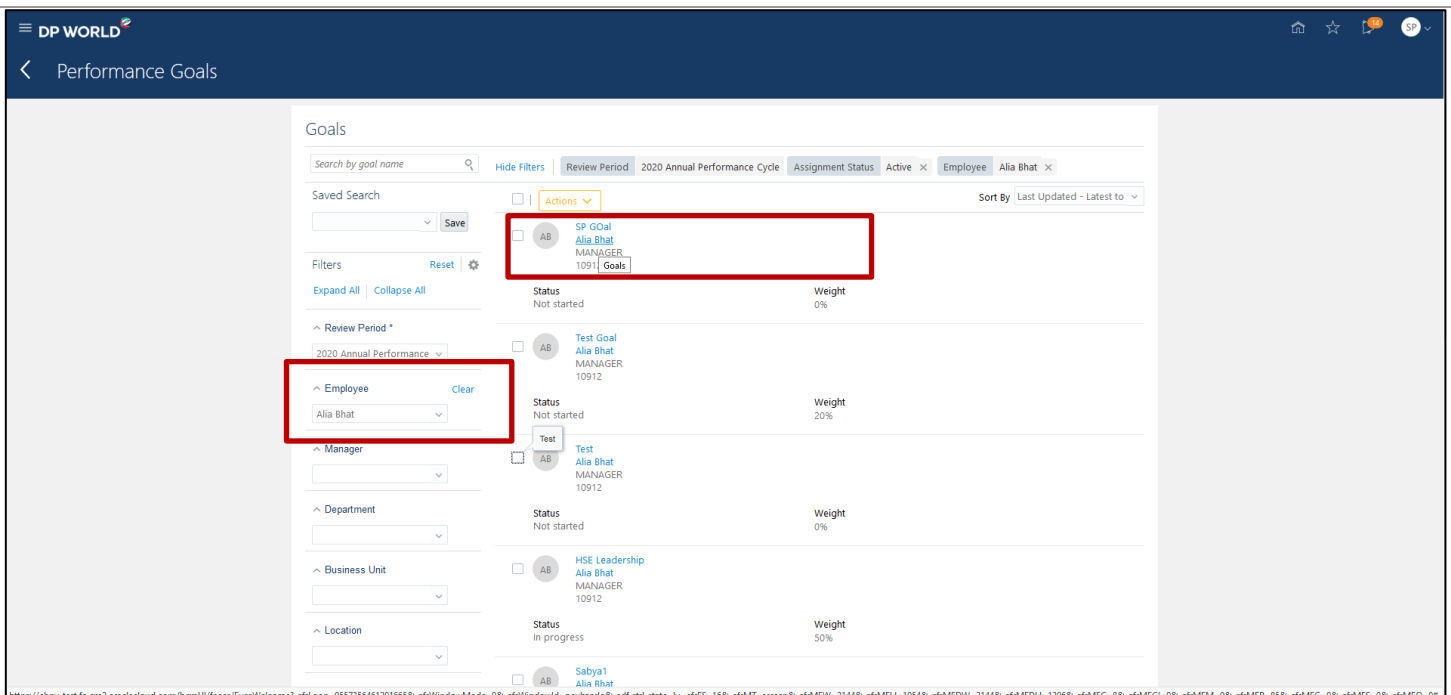


c) Click on Performance Goals



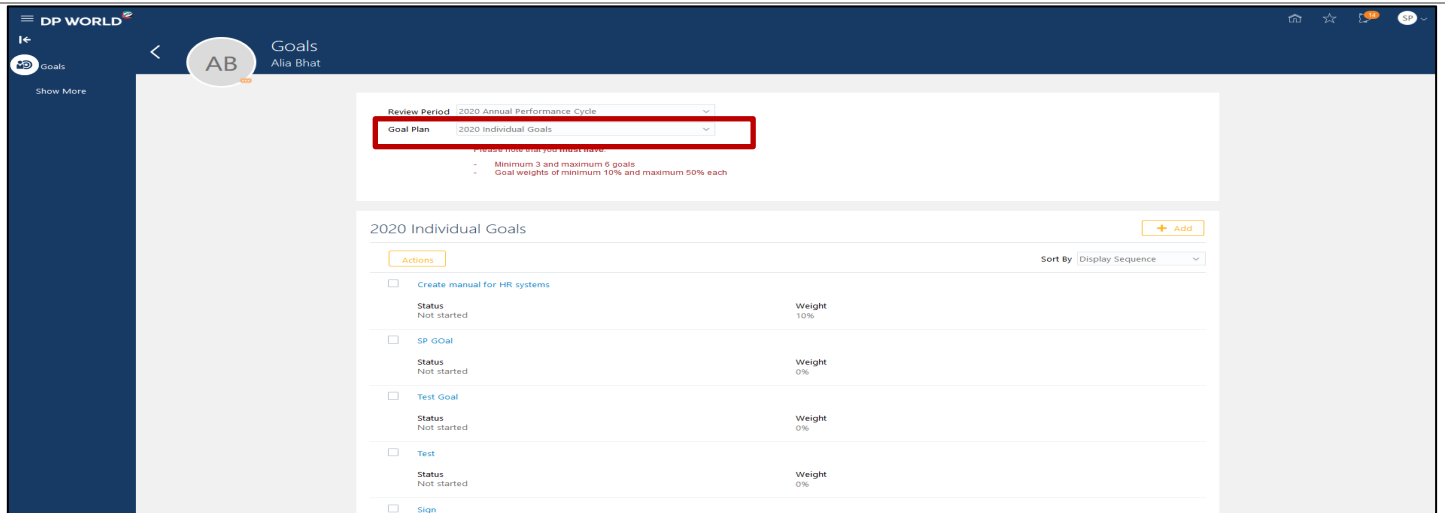
Explanation: There are variety of Filters are available for finding the goal data.

d) The first step for searching the goal document is to select the relevant Review Period. It is mandatory to select the Review Period.

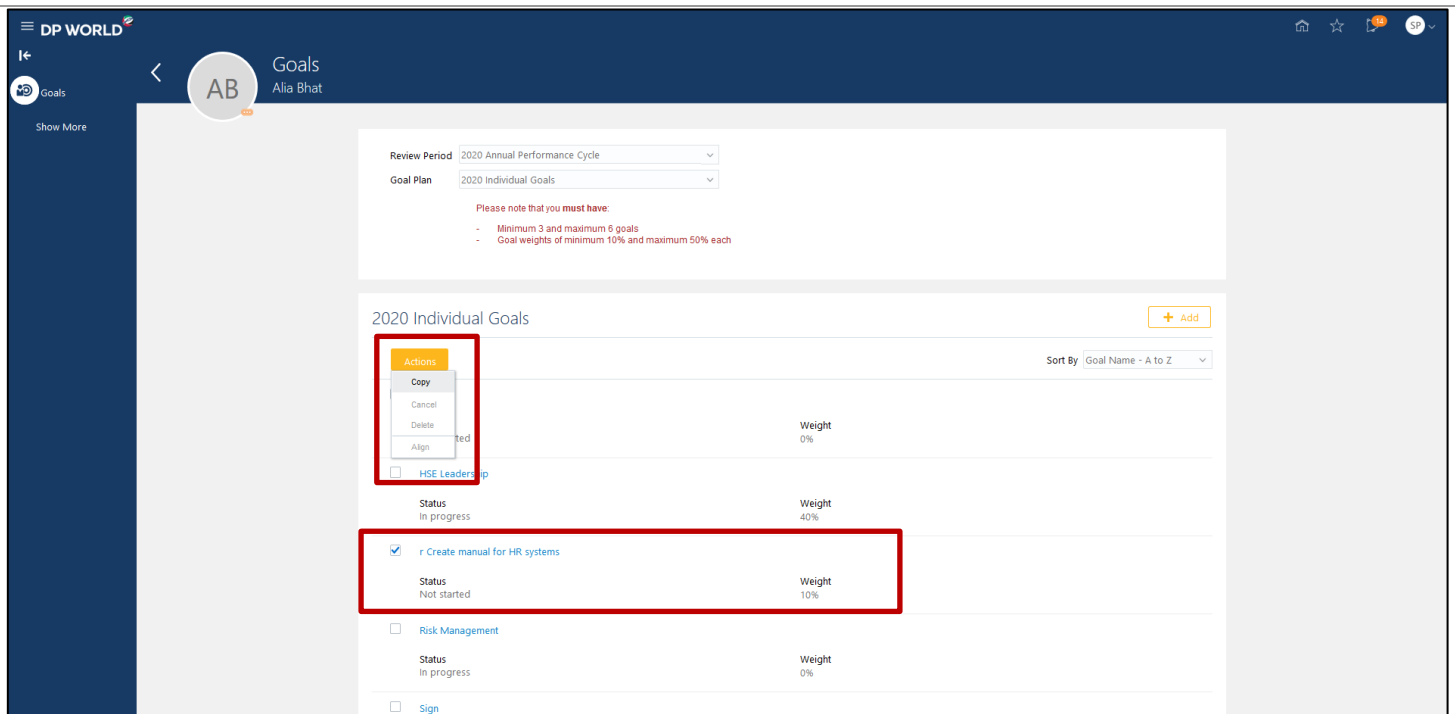


e) Next step is to type the employee first and/or last name and choose the relevant Employee. The page will populate the selected Employee's goals. (**Note:** This will provide the Employee's Regional, Functional and Individual goals. To view only Individual Goals, scroll down the filters on left side, under Goal Plan select the respective Individual Goal Plan.)

f) To delete goals for the Employee, click on the the Employee Name link



g) This will open the selected Employee Goal Document page, Review Period will be auto populated, you will need to select the Goal Plan from the dropdown. Select Individual Goal Plan, then the Individual goals of the Employee get reflected on the page.



Explanation: You can only delete goals that are added by HR specialist for the Employee, you cannot delete goals added by Line Manager / Employee. The system will not allow you to delete goals that are migrated to the Performance Document.

h) Once you select the Individual Goal added by HR specialist, click on Actions, you will see that the delete tab is disabled. (Delete tab will be enabled in Actions Tab only if you edit the weight of the Individual Goal to 0. You may have to modify the weights of the other goals as well to ensure that the sum of goal weights is equal to 100%).

Review Period: 2020 Annual Performance Cycle
 Goal Plan: 2020 Individual Goals

Please note that you must have:

- Minimum 3 and maximum 6 goals
- Goal weights of minimum 10% and maximum 50% each

2020 Individual Goals + Add

Goal Name	Status	Weight
<input type="checkbox"/> HSE Leadership	In progress	50%
<input checked="" type="checkbox"/> Create manual for HR systems	Not started	0%
<input type="checkbox"/> Risk Management	In progress	0%
<input type="checkbox"/> Sign	In progress	0%

i) After you update the goal weight to 0, If you select the Individual Goal added by HR Specialist, then click on the Actions tab, you will be able to select delete from the Actions list.

Review Period: 2020 Annual Performance Cycle
 Goal Plan: 2020 Individual Goals

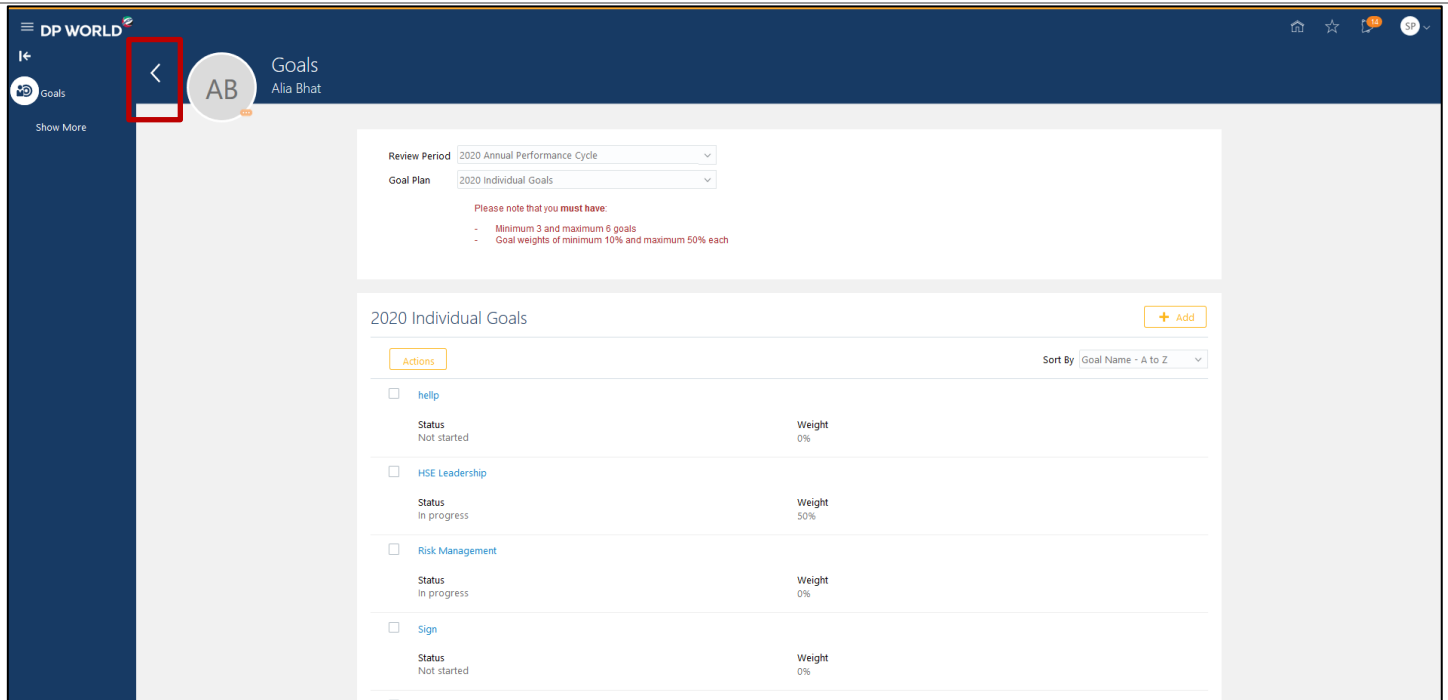
Please note that you must have:

- Minimum 3 and maximum 6 goals
- Goal weights of minimum 10% and maximum 50% each

2020 Individual Goals + Add

Goal Name	Status	Weight
<input type="checkbox"/> HSE Leadership	In progress	50%
<input checked="" type="checkbox"/> Create Manual for HR systems	Not started	0%
<input type="checkbox"/> Risk Management	In progress	0%

j) Warning message will get displayed to confirm you want to delete the goal. Click on Yes.

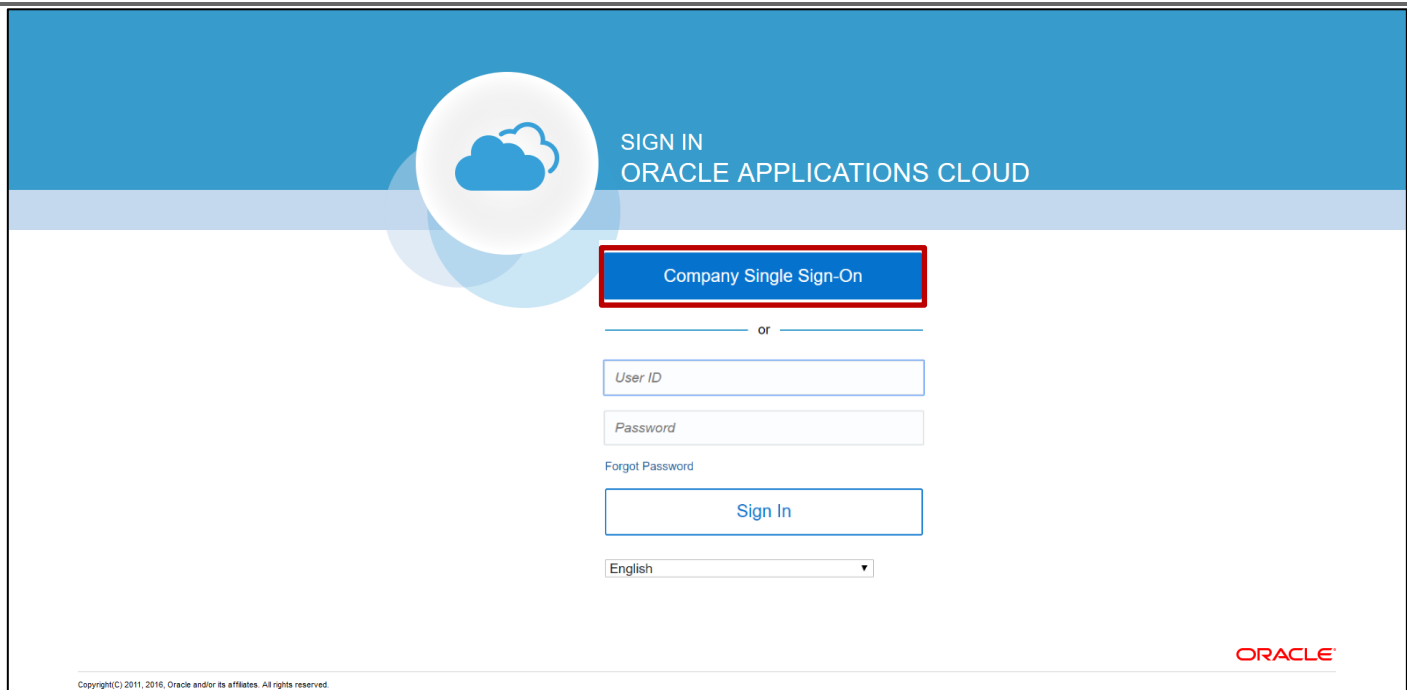


k) Once the goal is deleted, click on the Done arrow to go back to the search goals page.

Navigation Summary:

Sign in --> Home Page --> My Client Groups --> Goals --> Performance Goals --> Select Review Period --> Type Employee First Name Last Name --> Select the Employee --> Click on Employee Name Link--> Select Goal Plan --> Select Individual Goal to be Deleted --> Edit Goal Weight to 0 --> Save --> Click on Done arrow to go back to Goals Page --> Select Individual Goal to be Deleted --> Click on Actions --> Select Delete --> Click on Done arrow to go back to search goal page

2.6 Copy Goal for an Employee



SIGN IN
ORACLE APPLICATIONS CLOUD

Company Single Sign-On

or

User ID

Password

Forgot Password

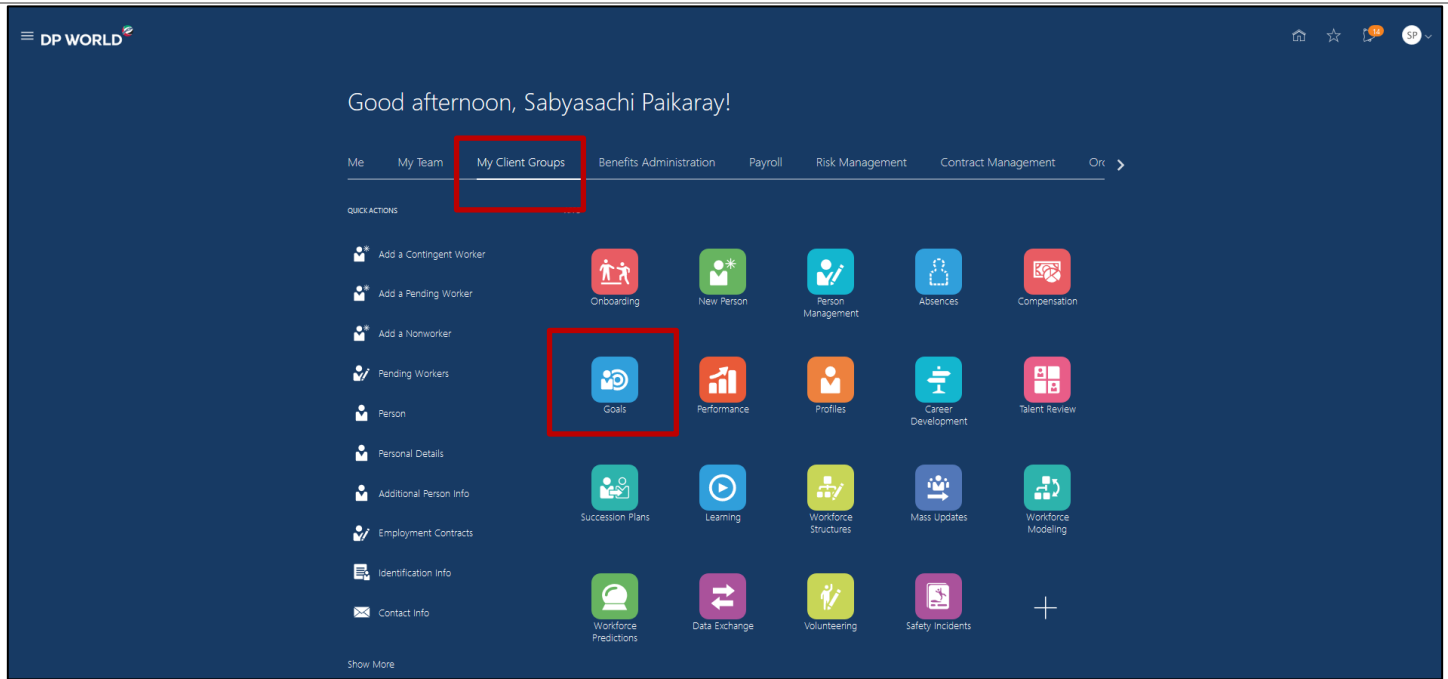
Sign In

English

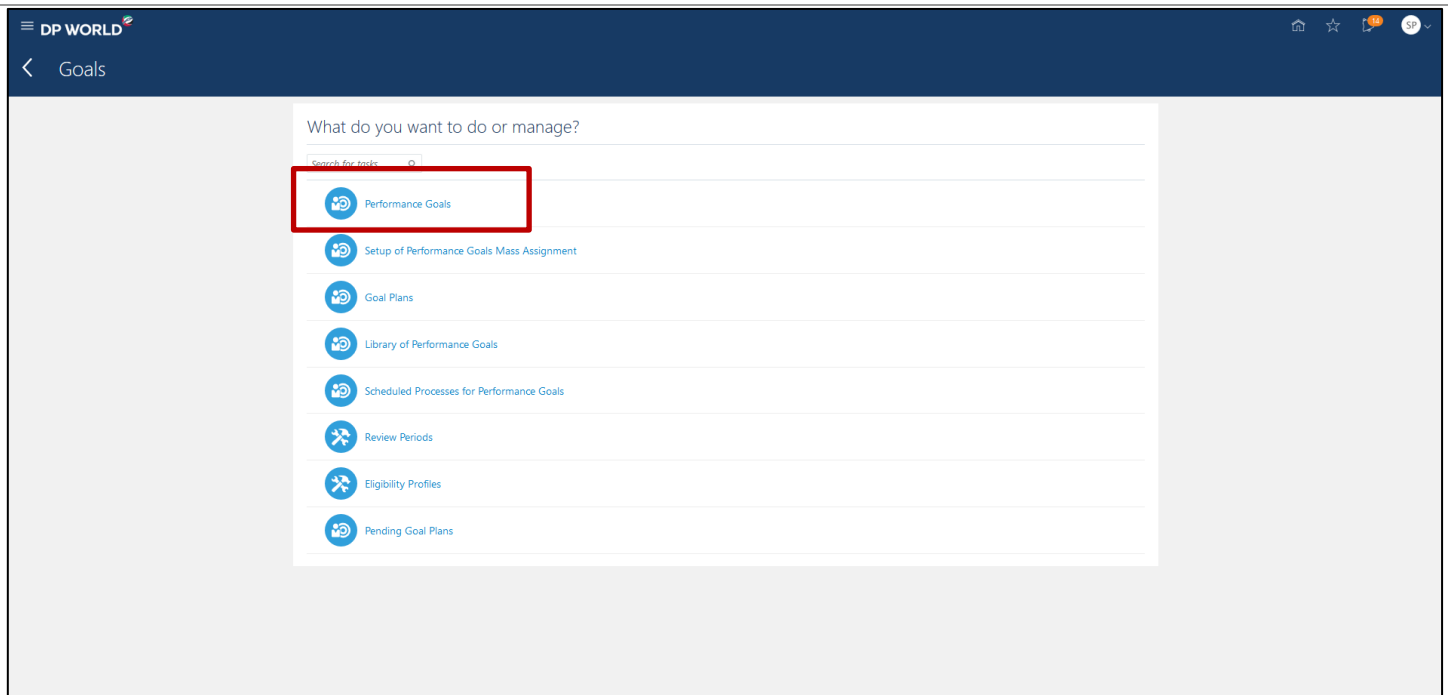
ORACLE

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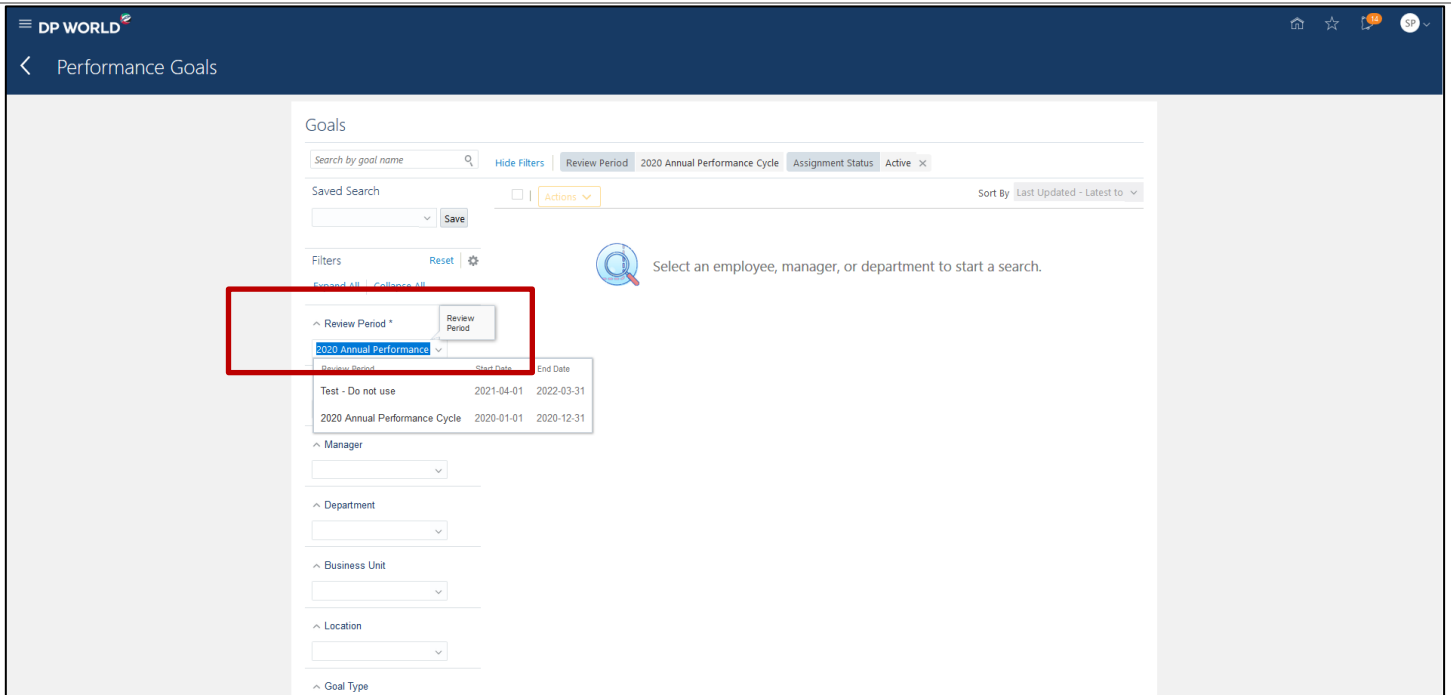
a) Click on 'Company Single Sign On' to login



b) Click on My Client Groups tab and then click on Goals

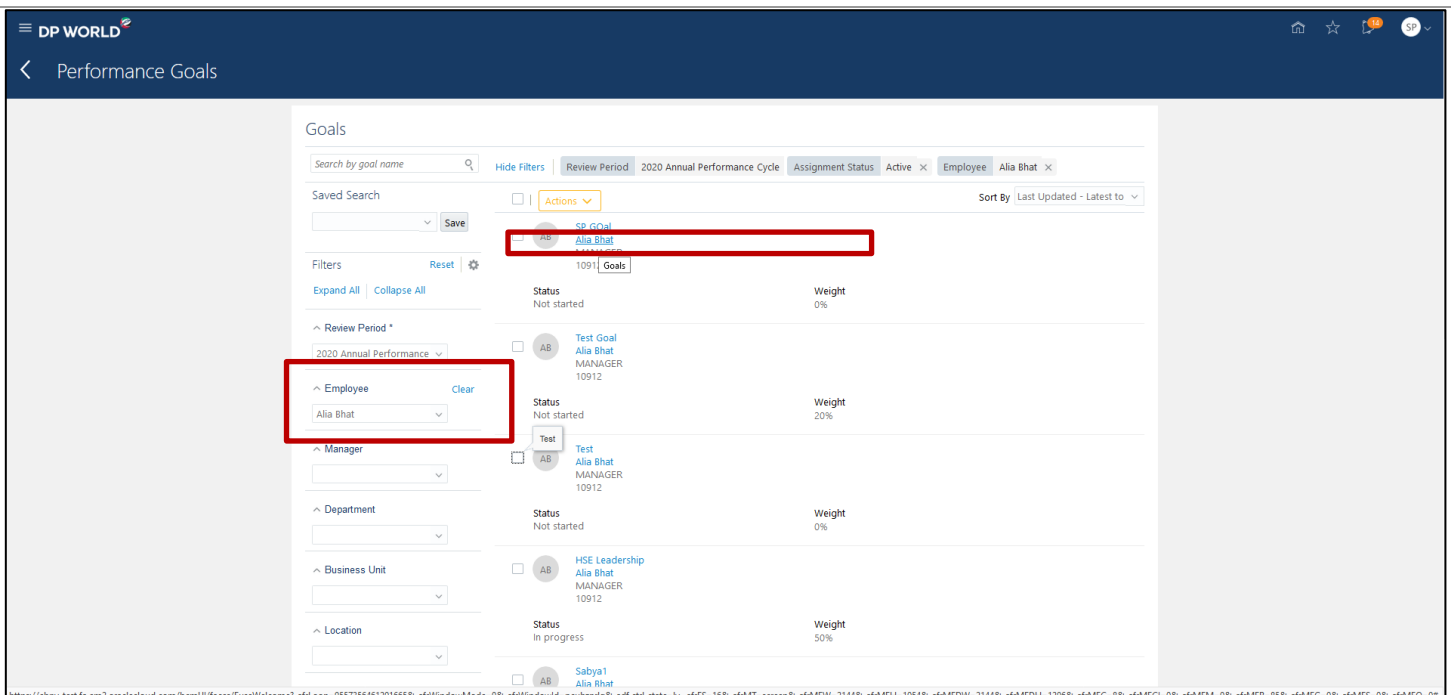


c) Click on Performance Goals



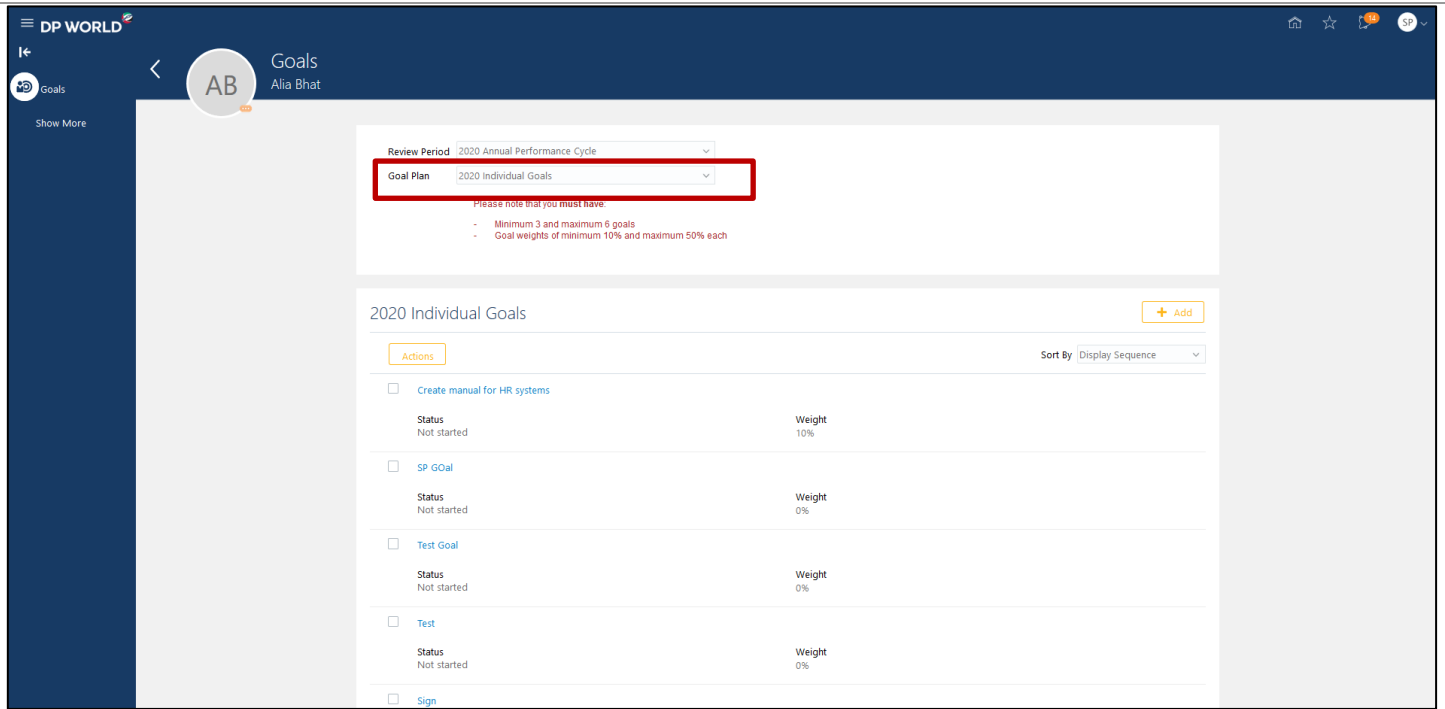
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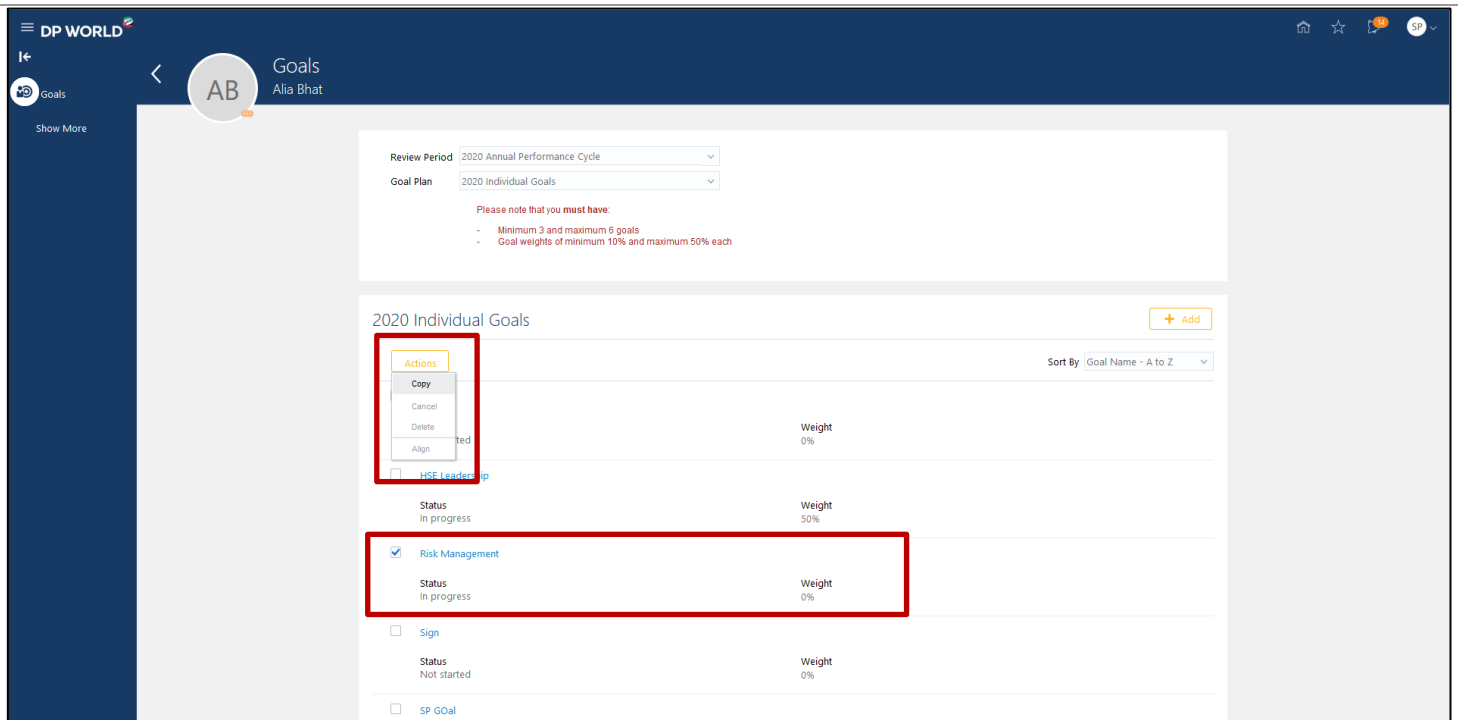


e) Next step is to type the employee first and/or last name and choose the relevant Employee. The page will populate the selected Employee's goals. (**Note:** This will provide the Employee's Regional, Functional and Individual goals. To view only Individual Goals, scroll down the filters on left side, under Goal Plan select the respective Individual Goal Plan.)

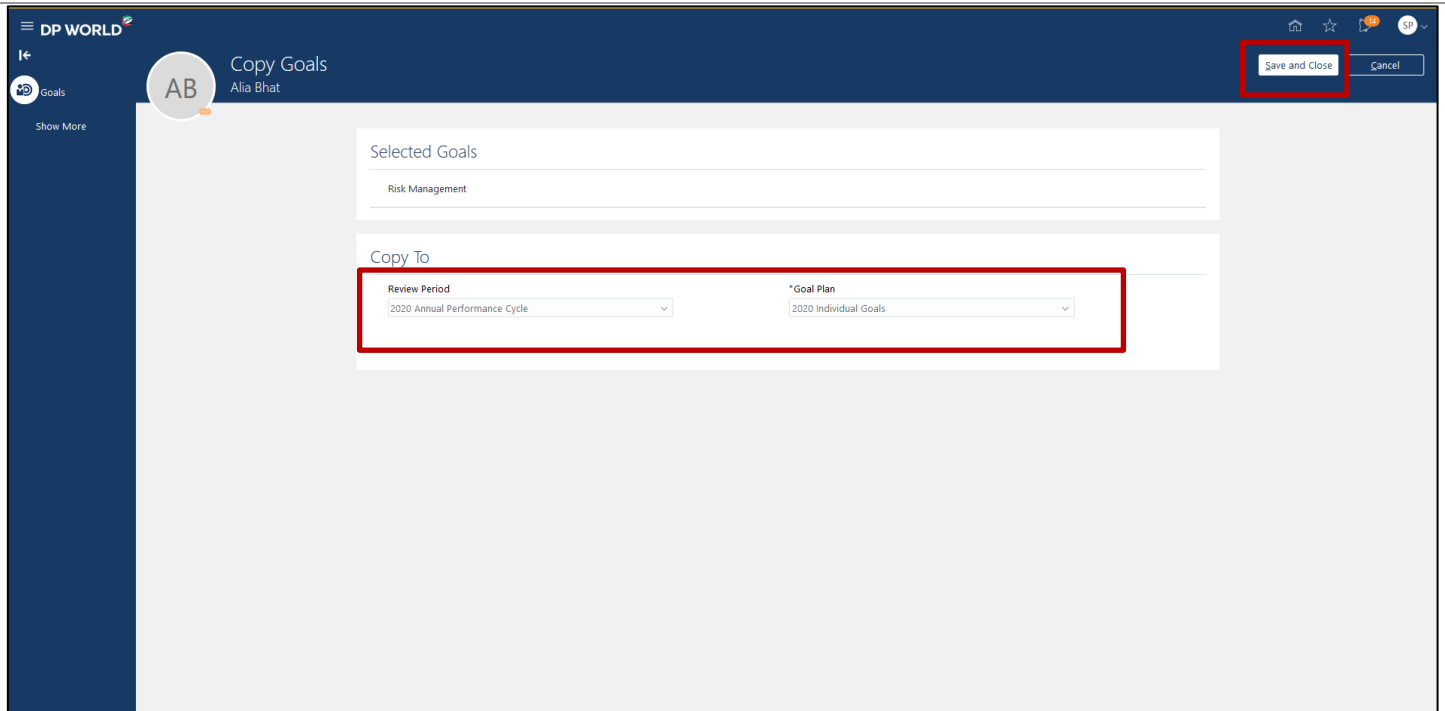
f) To copy goals for the Employee, click on the the Employee Name link



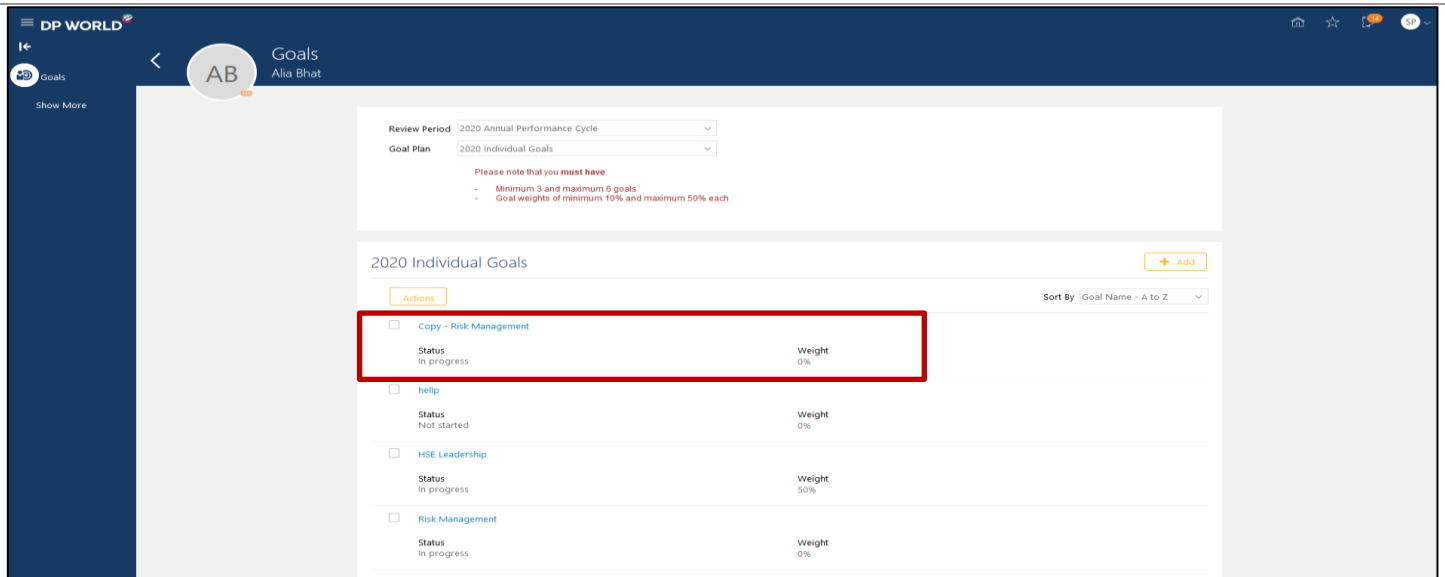
g) This will open the selected Employee Goal Document page, Review Period will be auto populated, you will need to select the Goal Plan from the dropdown. Select Individual Goal Plan, then the Individual goals of the Employee get reflected on the page.



h) If you select the Individual Goal, then click on the Actions tab, you will be able to select copy from the Actions list.



i) Choose the Review Period and Goal Plan that you would to copy the goal to. Then click on Save and Close



j) You can see the goal is copied with a name 'Copy -' appended to it. (The goal weight of a copied goal is always 0%, you can edit the goal name and the weight of the copied goal as and when required)

Navigation Summary:

Sign in --> Home Page --> My Client Groups --> Goals --> Performance Goals --> Select Review Period --> Type Employee First Name Last Name --> Select the Employee --> Click on Employee Name Link --> Select Goal Plan --> Select Individual Goal to be Copied --> Click on Actions --> Select Copy --> Select Review Period --> Select Goal Plan --> Save and Close.




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