

## **HCM Goals demo customization + Export + Import between instances.**

### **Redwood Cookbood 2026.**

#### **Introduction/Goal**

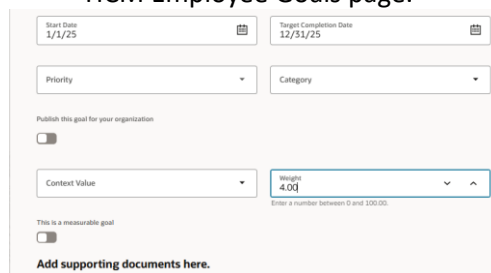
Newbies in Redwood learn quickly how to make basic customizations, but what about moving these customizations between different instances? This chapter will try to help.

It is written as the answer to a question asked on in Oracle Cloud Customer Connect.

We have done a small customization as demo to show the process: develop, export in source instance and import in target instance.

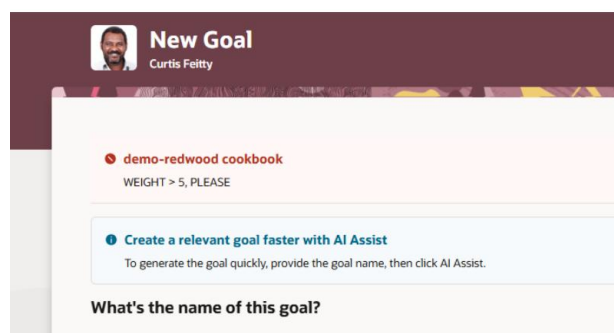
The following small validation in HCM is for demo purposes. Requirements.

If you assign a weight of 5 or less in  
HCM Employee Goals page.



The screenshot shows the 'New Goal' form in the HCM Employee Goals page. The form includes fields for 'Start Date' (1/1/25), 'Target Completion Date' (12/31/25), 'Priority', 'Category', 'Context Value', and 'Weight'. The 'Weight' field is set to 4.00. There are also checkboxes for 'Publish this goal for your organization' and 'This is a measurable goal', and a link to 'Add supporting documents here'.

You will get error



The screenshot shows the 'New Goal' page with a red error message: 'demo-redwood cookbook WEIGHT > 5, PLEASE'. Below the error message is a blue button labeled 'Create a relevant goal faster with AI Assist' with a subtext: 'To generate the goal quickly, provide the goal name, then click AI Assist.' At the bottom, there is a text input field labeled 'What's the name of this goal?'.

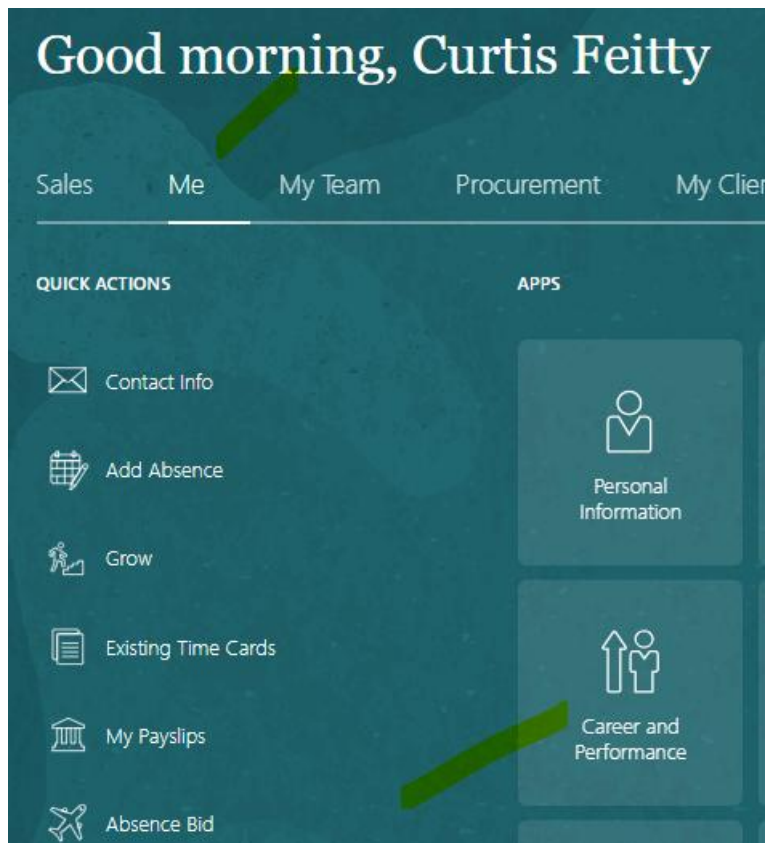
What would be the steps to set up this zip exported for the above customization in my instance?

We have written this to tell you how to accomplish this task.

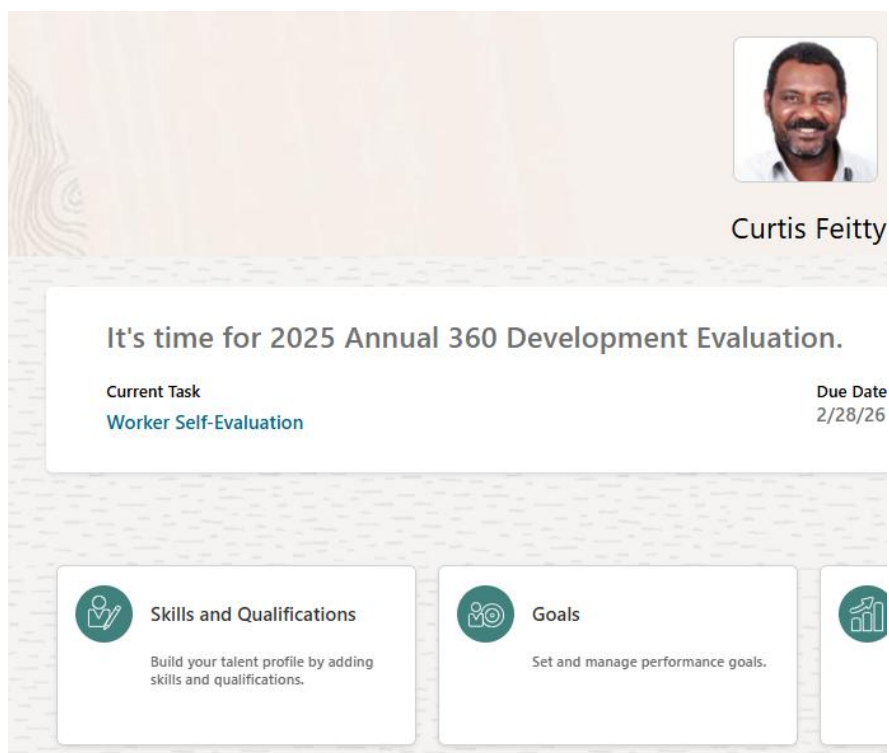
#### **Steps followed.**

##### **Step 1. Build the extension in source instance.**

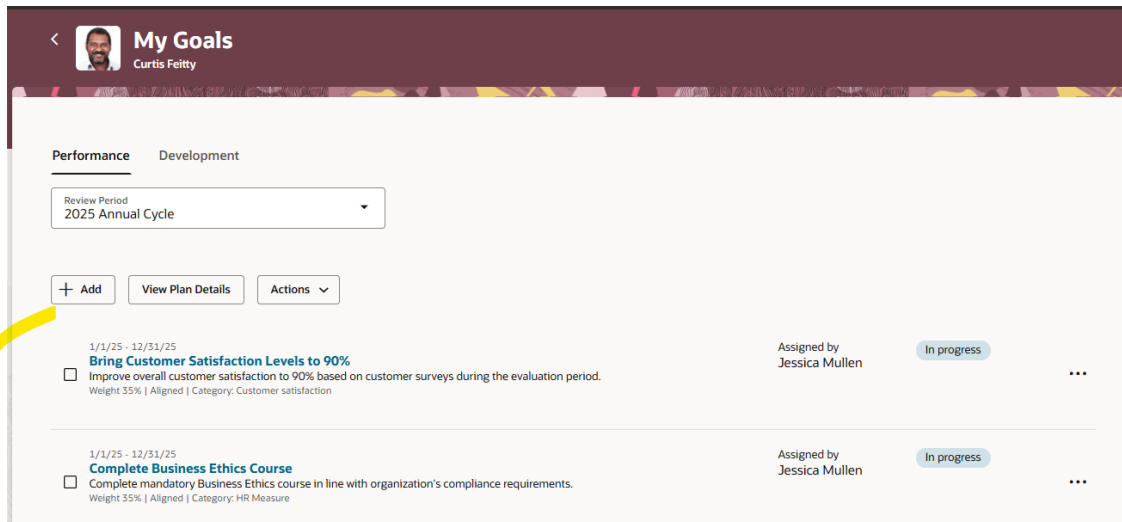
Navigate in SaaS, assuming your user has the proper roles (outside the scope of this).



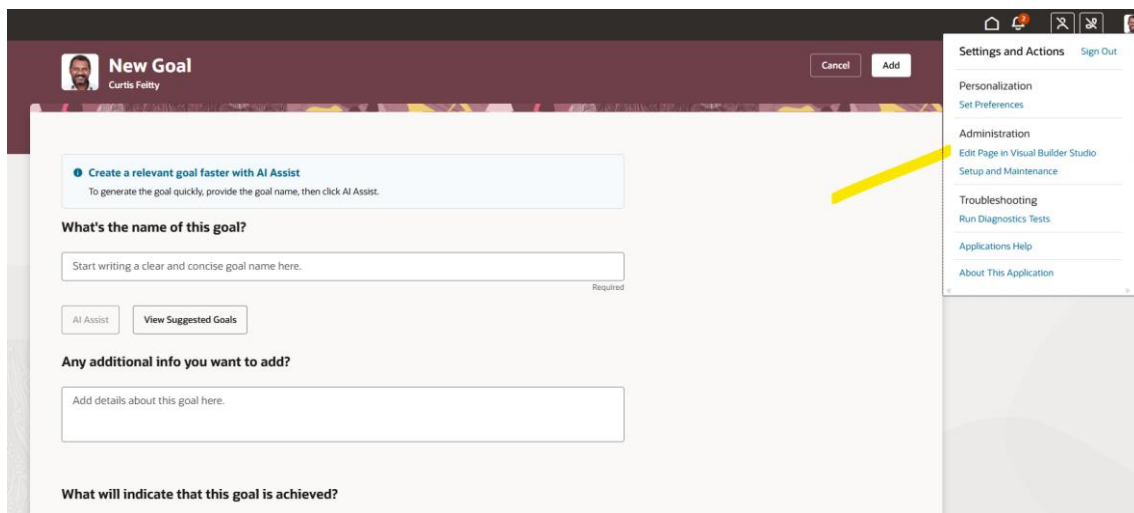
Click on Goals.



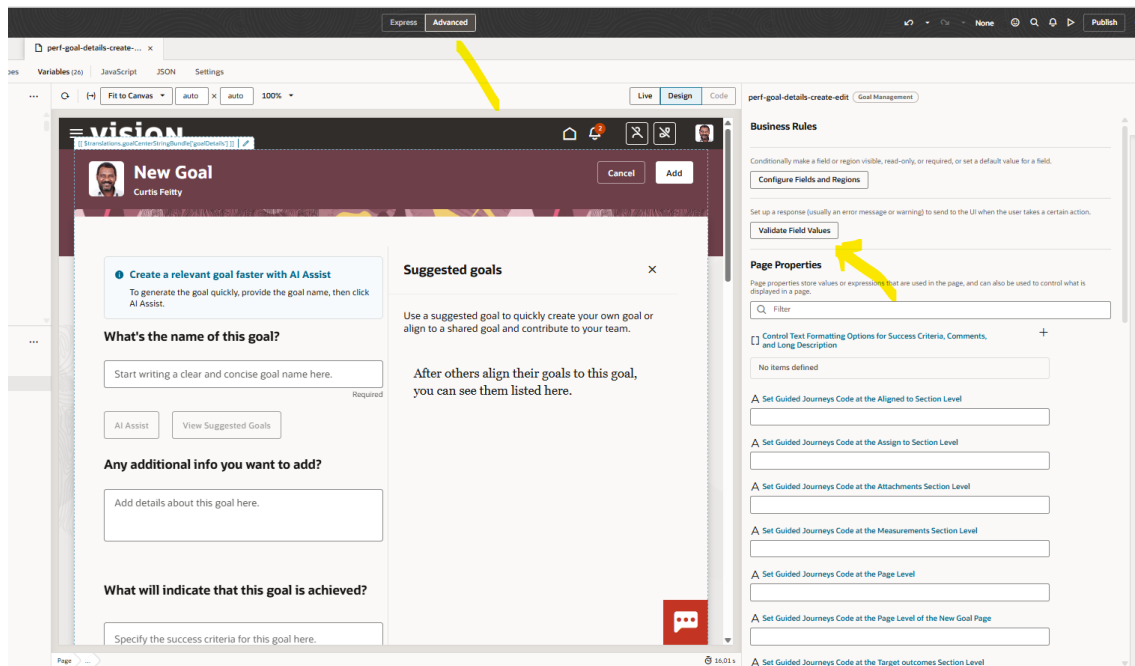
Click on Add.



Navigate to “Edit Page in VB Studio”.



Select “Advanced” and click in button as shown.



Now we have coded the following for basic validation.

Validations

for fields, rules

Rules

rod\_cookbook1

val\_redwood\_cookbook1

Add description

Condition

Rule applies if

all

of these conditions are satisfied:

Weight (performanceGoalsV2)

less than or equals

5

+ Condition

Use Advanced Expression

Messages

Summary \*

demo-redwood cookbook

Severity \*

Error

Target Fields

Weight x

Error Code

000

Detail \*

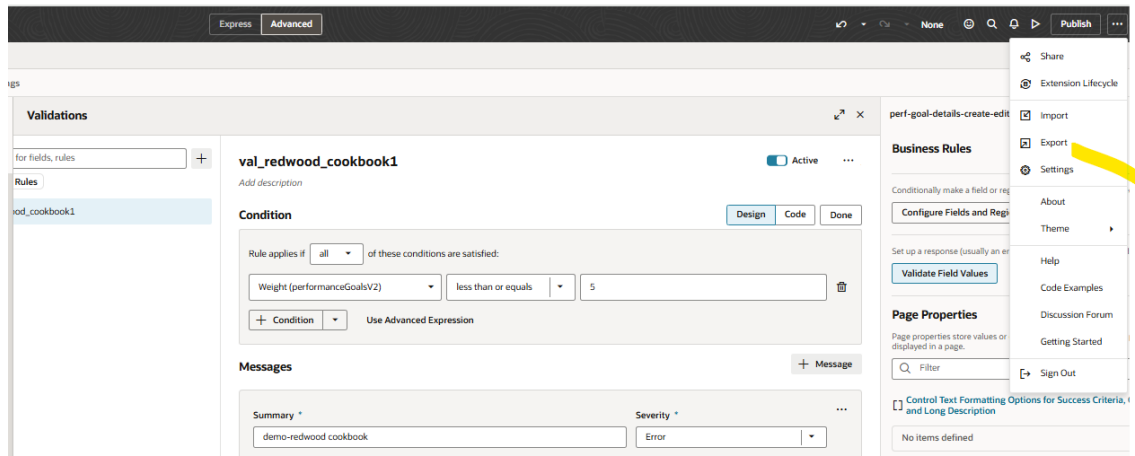
WEIGHT > 5 , PLEASE

After we complete the customization, we have to test that covers the requirements.

## Step 2. Export extension.

Use the option shown.

4

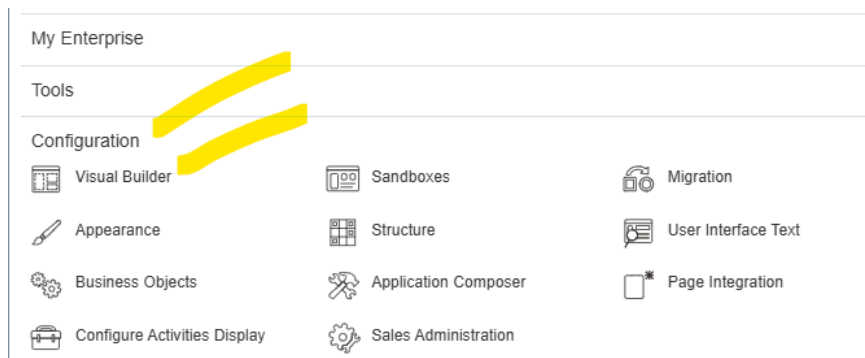


You will get a zip file with a long name; adapt to something you like to store, like:  
hcm\_extension\_validate\_goal\_weight\_v1.zip

### **Step 3. Create project in target instance.**

Note: not needed to create project if you already have one.

Access menu in SaaS.



Create project.

What's new?

The April 2025 update of Visual Builder Studio is here!  
Open What's New

Organization etajbe4e47-demoservices001-phx

Projects

OCI Account

Build Executor Templates

Build Executors

Component Exchange

Groups

Properties

Activities

Search

Member

Favorites

Owner

Shared

All

Projects

34

Disk Usage

857.15 MB

2000

20 GB

Create

Auto Refresh

Update Selected

Projects: 34

<input type="checkbox"/>	Name ^	Template ^	Favorite ^	Status ^	Updated ^	Members ^	Disk Usage ^
<input type="checkbox"/>	ck_proj		☆	Deleted Remove in 4 days	May 28, 2025	CF	...
<input type="checkbox"/>	ck_project		☆	Deleted Remove in 4 days	Jun 5, 2025	CF	...
<input type="checkbox"/>	ck_test		☆	Deleted Remove in 4 days	Jun 10, 2025	CF	...
<input type="checkbox"/>	DELIRAS		☆	Deleted Remove in 4 days	May 7, 2025	JD	...
<input type="checkbox"/>	demo		☆	Deleted Remove in 4 days	May 27, 2025	CF	...

Assign name.

New Project

1

2

3

4

Back

Details

Template

Properties

Team

Next

Project Details

Name

DEMO\_HCM\_GOALS\_WEIGHT

Description

Security

Use the Shared option to make the project code, wiki docs, tasks, and builds available to everyone inside your organization.

Private

Discoverable exposes this project name and owner contact details to everyone in your organization.

☒ Discoverable

Shared

Select Initial repository.

New Project

1

Details

2

Template

3

Properties

4

Team

Back

Next

Project Template

Optional create your project from a template to clone its settings, including any git repository content and build jobs.

Empty Project

Create a project with no preconfigured settings or content.

Initial Repository

Create a project with initial repository (empty, with readme.md file or imported).

Import Project

Create a project from exported project data stored in Cloud Storage.

Private Template

Create a project from private template using its Private Key.

Click on next and finish.

Create environment, select on the left side of the page the option as shown.

Organization

Project Home

Workspaces

Git

Merge Requests

Maven

NPM

Docker

Builds

Releases

Environments

Visual Builder Studio

DEMO\_HCM\_GOALS\_WEIGHT | Environments

Extension Lifecycle

+ Create Environment

FUSION

Service Instances

Details

Certificates

Deployments

1 Instance

Oracle Cloud Application IDCS Resource

Oracle Applications Cloud (Fusion)

Status

Available (12:21 PM)

Response Time

203 ms

Details

Workspaces

A workspace is where you can develop your mobile apps, web apps, or app extensions. Before you enter the Designer, you'll be asked to choose a workspace to serve as your private work area.

Go to Workspaces

Tell me more

Environments

An environment lets you connect to, view, and work with Oracle Cloud PaaS and Oracle Cloud SaaS service instances from within your project.

+ Create Environment

Tell me more

Auto Refresh

7

Assign name.


[+ Create Environment](#) [Tell me more](#)

Environment Name  
FUSION

Description

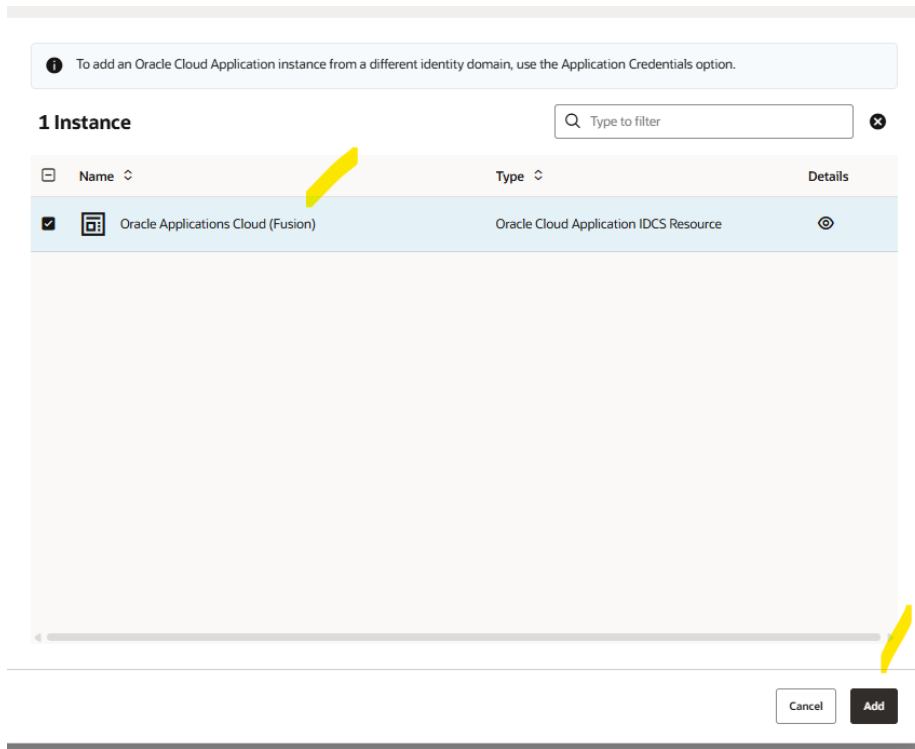
[Cancel](#) [Create](#)

[Service Instances](#) [Details](#) [Certificates](#)

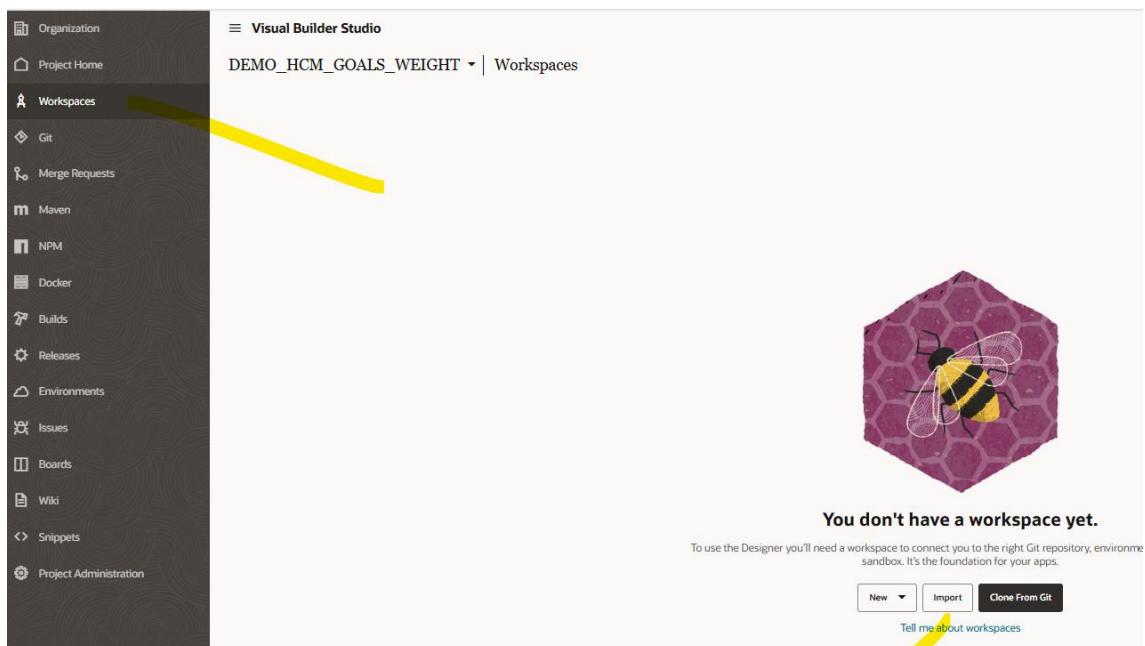
  
**Define Your Environment**  
Add one or more service instances to define your environment.  
[+ Add Instance](#)  
[Tell me more about environments](#)

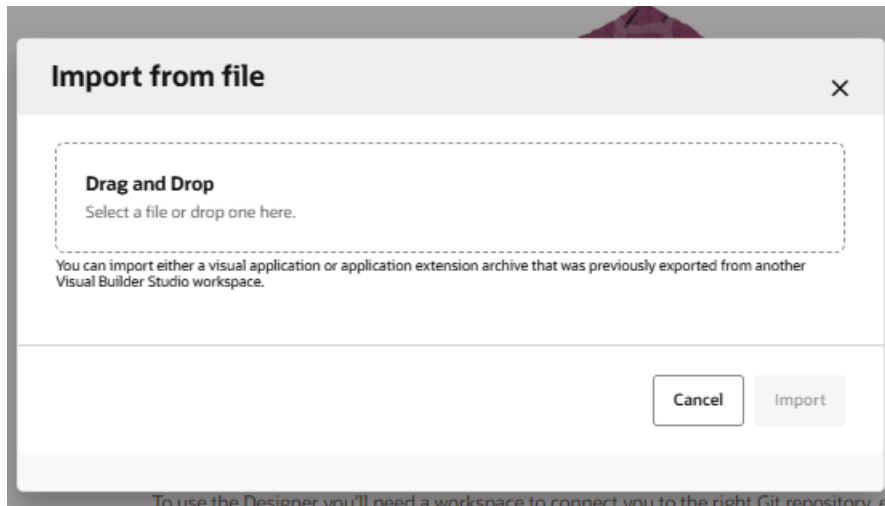
Select as shown the Fusion instance available.






Create a workspace with the name you prefer, and import the zip provided.






Select the zip file provided.

Nombre	Fecha de modificación	Tipo	Tamaño
 hcm_extension_validate_goal_weight_v1.zip	20/06/2025 11:27	Carpeta comprimi...	95 KB

Fill this information with your data and click “Import”.

**Import from file**

 **hcm\_extension\_validate\_goal\_weight\_v1.zip**  
This file contains an application extension.

Workspace Name  
ws\_hcm\_goal

Development Environment  
FUSION (Oracle Applications Cloud (Fusion))

Sandbox (optional)  
No sandbox selected

Git Repository ⓘ

☐ Use scratch repository

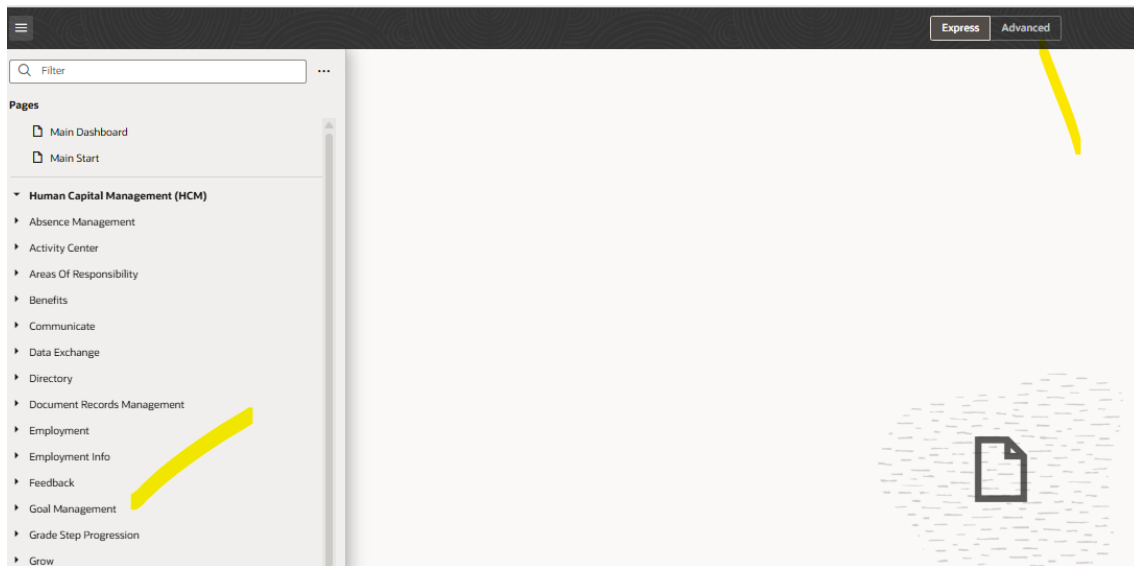
☒ Create new repository

Repository Name  
rep\_01

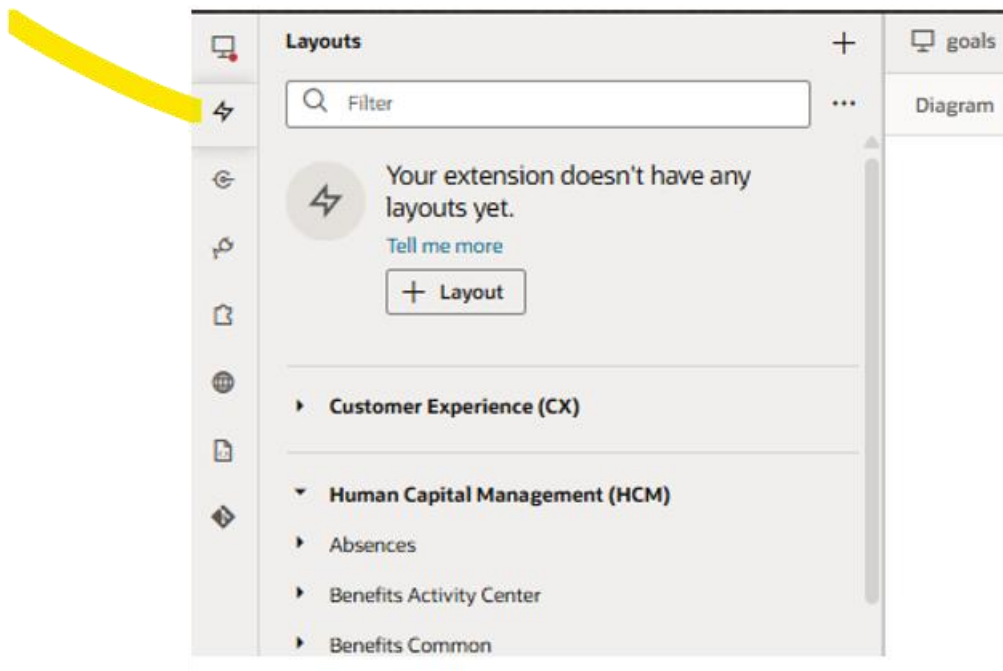
Working Branch Name  
bra\_01

Cancel Import

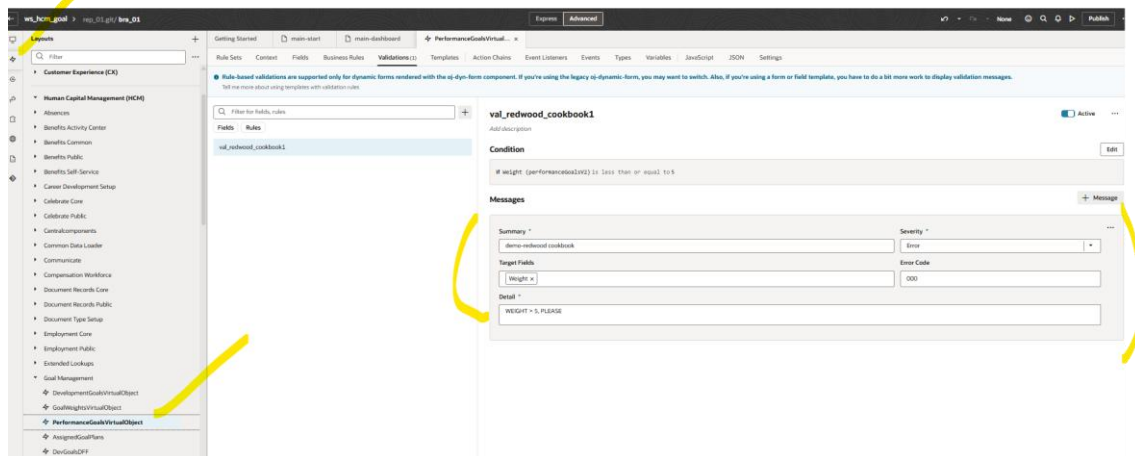
Now, after importing, select “Advanced” mode.



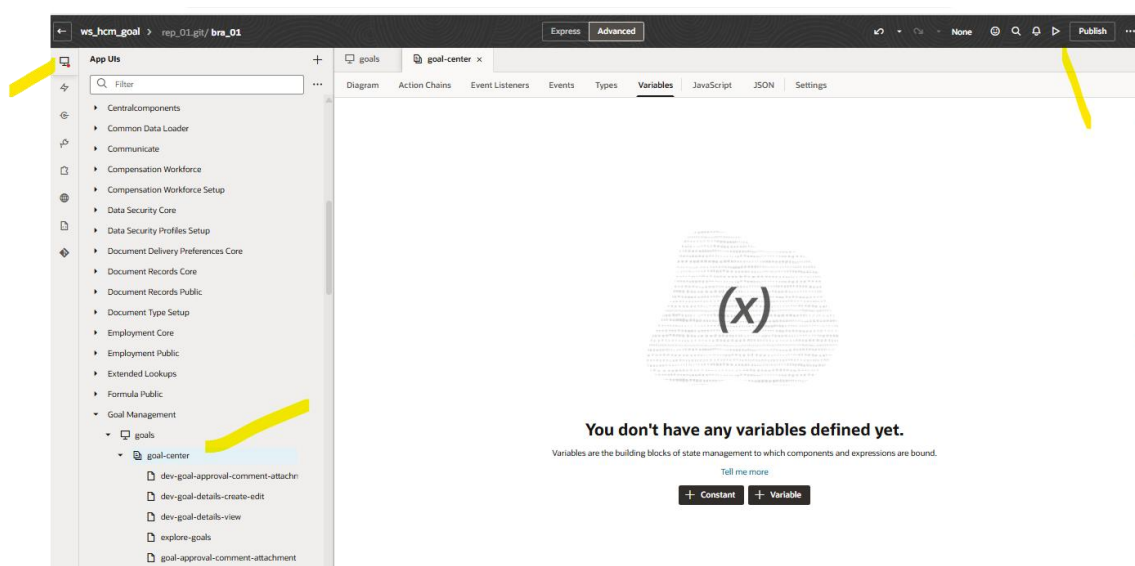
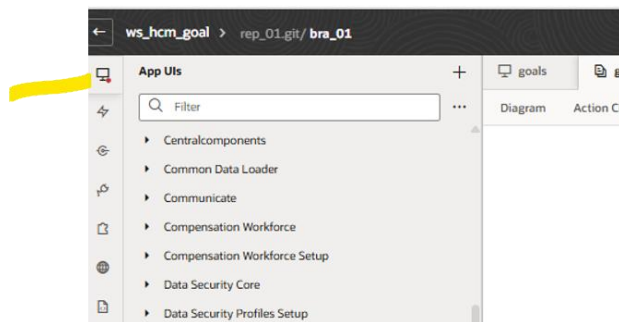
Now we could search for our extension navigating to mode “Layouts”.



Now we will search the “Goals”, and you could see the imported code.




Now let's give it a try the page, navigating to mode "App UI" as shown.




Testing.





## New Goal

Curtis Feitty


**demo-redwood cookbook**

WEIGHT > 5, PLEASE

**Create a relevant goal faster with AI Assist**

To generate the goal quickly, provide the goal name, then click AI Assist.

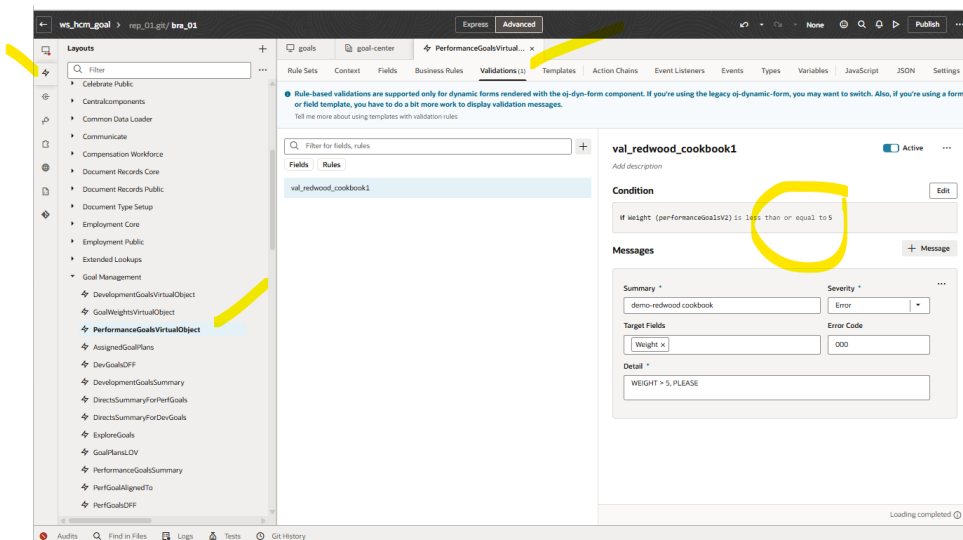
**What's the name of this goal?**

Start writing a clear and concise goal name here.

Required

Now if we want to change the limit of 5 to 10, we must navigate back to Layouts mode and make our change.

Close current testing page and navigate as shown.



Click on “Edit”.

**val\_redwood\_cookbook1**

Active

Add description

**Condition**

If weight (performanceGoalsV2) is less than or equal to 5

Edit

**Messages**

+ Message

And change the code according to your needs.

## val\_redwood\_cookbook1

Add description

### Condition

Rule applies if  of these conditions are satisfied:

Weight (performanceGoalsV2)

### Messages

Summary *	demo-redwood cookbook	Severity *	Error
Target Fields	Weight x	Error Code	000
Detail *	WEIGHT > 10, PLEASE		

Notice when the list of values shows, all fields available to make different validations.

## val\_redwood\_cookbook1

Add description

### Condition

Rule applies if  of these conditions are satisfied:

Weight (performanceGoalsV2)

- Field Values
  - performanceGoalsV2
    - Actual Completion Date
    - aiButton
    - AllowDelGoalCode
    - Who can delete this goal?
    - Allow managers to delete this goal
    - Allow Workers to Update Key Attributes
    - Assigned by Person ID
    - Assignment ID
    - Assignment Number
    - associatedGoalPlans
      - ActionType

At this step, feel free to Publish (not included in this demonstration, search for blogs for publishing VB-FA extensions).

## **Conclusion**

We have shown how to export and import an extension using a basic demo example.

### Technical

Code example	Comments
hcm_extension_validate_goal_weight_v1.zip	Extension exported to be used as example to import.