**Goal**

**Remaining tasks:** 1.send email function addition and template insertion

**1. Functionality**

**1.1 Oracle HCM Functionality**

In Oracle HCM’s Goal Management module, the process from goal creation to goal plan assignment includes:

1. Creating individual or team goals (SMART goals with measurable criteria).
2. Aligning goals with organizational or team objectives.
3. Assigning goals or goal plans to employees (either through manager or bulk assignment).
4. Continuous monitoring, tracking, and updating of goals.
5. Using these goals in performance reviews to evaluate employee contributions.

**1.2 Product Functionality**

creation of a review period and document type within the performance module, which forms the foundation for the entire goal-setting process. HR or managers can then proceed to create eligibility profiles, defining which employees are eligible for specific goals or goal plans based on various criteria. Once eligibility profiles are in place, the next step is goal creation. HR or managers can create individual goals that align with organizational objectives, such as performance improvement or employee development.

After the goals are defined, a goal plan is created, which can include mandatory goals that will be assigned to all eligible employees. These plans ensure that key goals are aligned across the organization, setting a consistent performance standard. Employees eligible for the goal plan are added automatically based on the predefined eligibility profiles.

In cases where HR or managers need to assign goals to multiple employees at once, the system allows for mass assignment of goals, streamlining the process by assigning goals to all employees who meet the eligibility criteria. If more specific or personalized goals are needed, managers or HR can manually assign individual goals to employees. Employees also have the ability to request specific goals from a collection. These requests are sent for approval to their manager or HR, and upon approval, the requested goal is assigned to the employee.

Additionally, goals can be assigned to employees individually or without being tied to a specific goal plan, based on the eligibility profiles and criteria established. Throughout the process, updates and progress can be tracked, and goals can be adjusted or reassigned as needed to ensure they meet organizational objectives. This entire workflow provides a structured and flexible system for managing employee performance and goal alignment.

**2. Collections**

**2.1 Collections used**

* **PGM\_review\_period**: stores information about performance review periods. Key fields include:

review\_period\_name: The name of the review period (e.g., "ORAS 2024 ANNUAL").

description: A brief description of the review period's purpose.

period\_start\_date: The start date of the review period (e.g., "1/1/2024").

period\_end\_date: The end date of the review period (e.g., "12/31/2024").

updated\_at: Timestamp of the last update (e.g., "2024-09-06 15:59:11").

updated\_by: The user who last updated the record (e.g., "Admin").

* **PGM\_performance\_document\_types**: stores details about the types of performance documents used in employee evaluations. Key fields include:

name: The name of the performance document (e.g., "ORAS Performance Document\_1").

description: A description of the document's purpose, typically including goal setting, competency assessment, and performance rating.

start\_date: The date from which this document type is valid (e.g., "1/1/1951").

end\_date: The date until which this document type is valid (e.g., "12/31/4712").

updated\_at: Timestamp of the most recent update (e.g., "2024-08-30 08:57:15").

updated\_by: The user who last updated the document (e.g., "Admin").

* **PGM\_eligibility\_profiles:** stores details about eligibility profiles used to determine which employees qualify for specific goals or programs. Here are the key fields:

eligibility\_profile\_definition:

name: The name of the eligibility profile (e.g., "ORAS\_Sales\_SN").

description: A brief description of the profile (e.g., "Oras\_testing").

assignment\_to\_use: Specifies the assignment type to be used (e.g., "Primary").

status: The current status of the profile (e.g., "Active").

view\_hierarchy: Describes the hierarchy type used for viewing (e.g., "Flat").

profile\_type: Specifies the type of profile (e.g., "Employee").

profile\_usage: Indicates where the profile is used (e.g., "Sales").

eligibility\_criteria: Contains criteria used to define eligibility for the profile.

personal: Includes personal attributes like gender, qualification, and person type (e.g., "N/A" for all fields).

employment: Includes employment-related details such as department (e.g., "Sales network"), business unit (e.g., "Sales"), and country (e.g., "All").

derived\_factors: Attributes such as age, length of service, and compensation (e.g., "N/A").

other: Contains additional criteria, such as benefit groups or participation in other plans (e.g., "N/A").

labor\_relations: Includes information related to labor unions or bargaining units (e.g., "N/A").

updated\_by: The user who last modified the profile (e.g., "Admin").

updated\_date: The timestamp of the most recent update (e.g., "2024-09-06 11:01:40").

* **PGM\_goal:** stores detailed information about specific goals assigned within the system. Here’s a breakdown of the fields:

basic\_info:

goal\_name: The title of the goal (e.g., "19009 - Optima/Viva").

description: A brief overview of the goal (e.g., "Achieve performance targets for 19009 - Optima/Viva product line").

start\_date: The date when work on the goal starts (e.g., "2024-01-01").

target\_completion\_date: The deadline for completing the goal (e.g., "2024-12-31").

category: The goal category (e.g., "Product Performance").

success\_criteria: Criteria for achieving the goal (e.g., "Meet or exceed target performance").

status: The current progress of the goal (e.g., "In Progress").

level: The level at which the goal is applied (e.g., "Company").

subtype: Further classification of the goal (e.g., "Annual Goal").

measurements:This section tracks the performance metrics for the goal.

measurement\_name: Describes what is being measured (e.g., "Performance of Optima/Viva").

unit\_of\_measure: The unit used to track performance (e.g., "Score").

start\_date: The date when measurements begin (e.g., "2024-01-01").

end\_date: The date when measurements end (e.g., "2024-12-31").

comments: Additional notes regarding the measurement (e.g., "Evaluate bi-annually").

target\_type: The type of performance target (e.g., "Range").

target\_value: The desired performance outcome (e.g., "6.0").

actual\_value: The actual performance achieved (e.g., "5.5").

tasks: This section lists tasks associated with achieving the goal.

name: The task name (e.g., "Enhance Optima/Viva Features").

type: The type of task (e.g., "Development").

status: The current status of the task (e.g., "In Progress").

priority: The priority level (e.g., "Medium").

comments: Task-related notes (e.g., "Add new features to enhance product performance").

completion\_percentage: Progress of the task (e.g., "30").

start\_date: Task start date (e.g., "2024-02-01").

target\_completion\_date: Expected task completion date (e.g., "2024-06-30").

related\_link: Links to relevant resources (e.g., "<http://example.com/optima-viva-enhancements>").

updated\_by: The user who last modified the goal (e.g., "Admin").

updated\_at: The timestamp of the last update (e.g., "2024-09-06 17:15:12").

* **PGM\_goal\_plan:** defines goal plans for a specific review period, including details like the plan name, evaluation type, associated goals, and eligibility profiles. It also specifies included and excluded workers for the plan, along with timestamps for updates. This ensures structured management of performance goals during the review period.
* **PGM\_my\_goals:** collection stores individual goal details assigned to an employee. It includes the employee's name (e.g., "Fiorangela Sguotti"), the assigned goal plan, review period, and performance document type. The goal details (e.g., "CRM process in use") contain start and target completion dates, goal type, and progress status. Measurements and tasks related to the goal are also tracked, including progress, completion percentages, and related links. This collection facilitates tracking of an individual's goal progress and associated tasks during the performance review period.
* **PGM\_goal\_offering**: collection tracks individual goal offerings assigned to employees. It includes details such as the employee's name (e.g., "Marzena Blabuś"), the assigned goal plan, review period, and performance document type. The goal (e.g., "CRM process in use") has a start and target completion date, and includes specific measurements (e.g., "Sales Target") with target and actual values. Tasks related to the goal (e.g., "Develop new leads") are tracked with their status and completion percentage. The overall status of the goal offering (e.g., "approved") is included along with a timestamp for tracking. This collection helps manage and monitor the approval and progress of specific goals assigned to employees.
* **PGM\_mass\_assign\_process:** collection tracks the mass assignment of goals to employees based on predefined criteria. Key fields include:

process: Describes the operation being performed (e.g., "mass assign goals").

goal\_plan\_name: Name of the goal plan being assigned (e.g., "ORAS Sales STI Goal Mid Year").

review\_period: The review period associated with the goal plan (e.g., "ORAS 2024 H1").

performance\_document\_type: Type of performance document used (e.g., "ORAS Performance Document\_1").

goals: Contains a list of goals being mass assigned, along with their associated measurements and tasks (e.g., "Project 95 - Inventory Turn 6m").

eligibility\_profiles: Profiles used to determine which employees are eligible (e.g., "ORAS\_Sales\_SN\_B", "ORAS\_Sales\_SN\_A").

included\_workers: Specific employees to be included (empty in this case).

excluded\_workers: Employees excluded from the process (e.g., "Kosta Kourtis").

updated\_by: The user who last modified the process (e.g., "Admin").

updated\_at: The timestamp of the last update (e.g., "2024-09-09 15:32:12").

This collection **helps automate the process of assigning goals to eligible employees in bulk.**

* **SCH\_email\_template :** for templates insertion

**For personal use to check eligible employess based on eligiblity**

* PGM\_eb\_employees: collection tracks employees who are associated with specific eligibility profiles for goal assignment purposes. Key fields include:

**eligibility\_profiles**: Lists the eligibility profiles and the employees associated with them (e.g., profile "ORAS\_Sales\_SN\_B" includes employees like "Jean-Pierre Levert" and "Patrick Gerdon").

**included\_workers**: A list of workers explicitly included for assignments (empty in this case).

**excluded\_workers**: A list of workers excluded from assignments (empty in this case).

**combined\_employees**: A consolidated list of all employees from the eligibility profiles (e.g., "Jean-Pierre Levert", "Daniel Heeren").

This collection helps manage which employees are eligible for goals or tasks based on predefined profiles and allows for easier tracking of included or excluded workers.

**3. Program Reuse**

* **Existing code** :

**1**. Eligibility profiles creation code

2. Server email template insertion route(not code)

https://app1.fusionobjects.com/insert\_template

**4. Examples**

Example 1: Annual Goal Setting for Sales Team

Scenario: A company, "ORAS Corporation," conducts annual performance reviews for its sales team. As part of the performance cycle for 2024, the HR team is tasked with setting goals for all sales employees.

Steps:

1. Review Period Setup: HR sets up a review period for "ORAS 2024 ANNUAL" using the system. This review period defines the evaluation timeframe from January 1, 2024, to December 31, 2024.
2. Eligibility Profile Creation: An eligibility profile named "ORAS\_Sales\_SN" is created. This profile includes all employees from the sales department, such as "Jean-Pierre Levert" and "Patrick Gerdon," ensuring only sales team members are assigned sales-specific goals.
3. Goal Plan Creation: HR creates a goal plan named "ORAS Sales STI Goal Plan\_Annual" and links it to the review period. Goals like "CRM process in use" and "Increase sales by 20%" are included in this plan.
4. Mass Assignment: Using the eligibility profile, the system mass-assigns these goals to all sales employees who are part of "ORAS\_Sales\_SN." Employees like "Jean-Pierre Levert" and "Daniel Heeren" receive these goals, and the system tracks progress over the review period.
5. Progress Tracking: Throughout the year, sales team members update their progress, and managers review their achievements. Metrics like "CRM Implementation Status" are tracked and updated quarterly.
6. Evaluation and Review: At the end of the year, HR and managers use the performance document type to review each employee’s progress on assigned goals, which will be part of their annual performance review.

Outcome: This ensures consistent goal setting, tracking, and evaluation across the entire sales department, helping ORAS Corporation align individual performance with company-wide sales objectives.

Example 2: Employee-Requested Goals for Professional Development

Scenario: An employee, "Fiorangela Sguotti," from the marketing department, wants to take on additional goals for personal development in line with her career progression plan.

Steps:

1. Goal Offering Request: Fiorangela logs into the system and requests a goal called "Digital Marketing Certification," which is part of a goal offering collection available for professional development.
2. Approval Process: The system routes her request to her manager for approval. The manager reviews the goal and approves it through the goal offering process, which triggers an automated email notifying Fiorangela that her goal has been approved.
3. Goal Assignment: Once approved, the goal is automatically assigned to Fiorangela. The system tracks the start and target completion dates, along with any relevant success criteria or tasks.
4. Progress Updates: Throughout the year, Fiorangela updates her progress on the goal, with milestones like enrolling in the certification course and passing the final exam tracked in the system.
5. Manager Review: Fiorangela's manager receives periodic updates and feedback on her progress and provides additional support or adjustments as necessary.
6. End-of-Year Evaluation: During the annual review, the completed goal is included in her performance document, and her achievements are evaluated as part of her overall performance for the year.

Outcome: This use case enables employees like Fiorangela to take control of their career development, request additional goals, and get them approved and tracked within the performance management system. It supports employee growth while ensuring proper oversight by managers.

**5. Scenarios**

5.1 Scenario 1: Mass Assignment of Goals for the Sales Department

* Description: The HR department needs to assign performance goals to all sales employees for the first half of the year. They use the "ORAS Sales STI Goal Plan Mid Year" and mass-assign it to all eligible employees in the "ORAS\_Sales\_SN\_B" eligibility profile.
* Expected Outcome: All employees in the "ORAS\_Sales\_SN\_B" profile, such as "Jean-Pierre Levert" and "Patrick Gerdon," receive the goals from the selected goal plan. The system logs the assignment, tracks the progress of individual goals, and excludes specified employees like "Kosta Kourtis" if they are marked in the exclusion list.

5.2 Scenario 2: Individual Goal Assignment by Manager

* Description: A manager identifies that one employee, "Fiorangela Sguotti," requires an additional goal to improve performance on the CRM system. The manager uses the system to manually assign the goal "CRM process in use" to Fiorangela.
* Expected Outcome: Fiorangela is assigned the new goal, and her progress is monitored throughout the review period. The system sends a notification of the new goal assignment, and the manager can track updates as Fiorangela completes the associated tasks.

5.3 Scenario 3: Employee Requests Goal for Personal Development

* Description: An employee, "Marzena Blabuś," wants to take up a new goal, "Digital Marketing Certification," from a collection of optional development goals. She sends a request for this goal, which requires approval from her HR manager.
* Expected Outcome: The HR manager receives the goal request for approval. Upon approval, the system assigns the goal to Marzena, and she can start tracking her progress on the goal, with completion dates and success criteria recorded.

5.4 Scenario 4: Creation of a New Review Period for 2025

* Description: The HR team needs to create a new review period for 2025. They input the dates from January 1, 2025, to December 31, 2025, to ensure the upcoming performance year is set up for employee evaluations and goal tracking.
* Expected Outcome: The review period is successfully created in the system, and all subsequent goals, goal plans, and performance documents for 2025 can be linked to this review period. The system should reflect this review period in any new goal plans created for the following year.

5.5 Scenario 5: Tracking and Updating Goal Progress

* Description: A sales team member, "Alex Six," has been assigned a goal to increase sales by 20%. During the quarterly review, he updates his progress, indicating that he's achieved 15% of the target.
* Expected Outcome: The system records the updated progress and displays it in the manager’s dashboard. The goal's status is updated to reflect the current progress, allowing the manager to follow up with any necessary coaching or adjustments to the goal. The system also stores progress history for reference during the final review.

**6. Issues / Blockers**

**6.1 Current Issues**

**6.2 Potential Blockers**

* **Blocker 1**: Potential future challenge and its possible impact.
* **Blocker 2**: Potential future challenge and its possible impact.

**7. Additional Considerations (Optional)**

**8. Routes Used in the Code**

**8.1 List of Routes**

| **Route** | **Purpose/Use** | **User Role (HR/Manager/Employee)** | **Input** | **Output** |
| --- | --- | --- | --- | --- |
| 1.http://127.0.0.1:5000/eligibility/create | Route to create a new eligibility profile | HR/Manager | Eligibility profile deatails | Confirmation message or error |
| 2.http://127.0.0.1:5000/goal/create | Route to Create a New Goal | HR/Manager | Goal details | Success message or error |
| 3.http://127.0.0.1:5000/goal\_plan/create | Route to Create a New Goal Plan | Manager/HR | Goal plan details | Success message or error |
| 4.http://127.0.0.1:5000/goal\_plan/add\_workers\_to\_goal\_plan | Route to Add Workers to an Existing Goal Plan | HR/Manager | included\_workers` or `excluded\_workers` are provided | Success message or error |
| 5.http://127.0.0.1:5000/goal\_plan/overwrite\_workers\_in\_goal\_plan(in place of this need to be delete route)  6.http://127.0.0.1:5000/goal\_plan/add\_eligibility\_profiles\_to\_goal\_plan  7.http://127.0.0.1:5000/goal\_plan/overwrite\_eligibility\_profiles\_in\_goal\_plan(delete method needs to be there)  8. <http://127.0.0.1:5000/goal/assign>  9. <http://127.0.0.1:5000/goal/goal_offering>  10. <http://127.0.0.1:5000/goal/process_goal>  11. <http://127.0.0.1:5000/goal/mass_assign>  12.http://127.0.0.1:5000/goal/assign\_on\_combined\_employee\_list  13. <http://127.0.0.1:5000/goal/assign_goals>  14. <http://127.0.0.1:5000/goal/update_goal>  15. <http://127.0.0.1:5000/goal/add_measurementg>  16. <http://127.0.0.1:5000/goal/add_taskg>  17. <http://127.0.0.1:5000/goal/date_and_goal_type>  18. <http://127.0.0.1:5000/goal/update_progress>  19. <http://127.0.0.1:5000/goal/add_measurement>  20. <http://127.0.0.1:5000/goal/add_task>  21.http://127.0.0.1:5000/goal/update\_task\_completion  22. <http://127.0.0.1:5000/goal/update_task_status>  23. <http://127.0.0.1:5000/goal/add_feedback>  24. <http://127.0.0.1:5000/goal/add_comment>  25. <http://127.0.0.1:5000/goal/filter_goals>  26.http://127.0.0.1:5000/goal/overwrite\_measurements  27. http://127.0.0.1:5000/goal/overwrite\_tasks  28.http://127.0.0.1:5000/goal/overwrite\_measurementsg  29. <http://127.0.0.1:5000/goal/overwrite_tasksg>  30. <http://127.0.0.1:5000/send-goal-deadline-alerts>  31. http://127.0.0.1:5000/send-task-deadline-alerts | Route to Overwrite Workers in a Goal Plan  Route to Add Eligibility Profiles to a Goal Plan  Route to Overwrite Eligibility Profiles to a Goal Plan  Route to Assign a Goal to an Individual Employee  Employee Goal Request Route  Goal offering data with status (approved rejected or change request)  Route to Mass Assign a Goal to Multiple Employees Based on Eligibility Profiles  Route to Assign Goals from a Goal Plan to Eligible Employees based on goal plan eligibility  Route to Assign Goals to Employees Based on Goal Plan and Eligibility Profiles provided  Route to Update an Existing Goal in the Collection  Route to add measurement to goal (pgm\_goal)  Route to add task to goal (pgm\_goal)  Route to Update the Start Date orTarget Completion Date or goal type for my goals   Route to Update the Progress of a my Goal  Route to add measument to my goals  Route to add task to my goals  Route to Update the task comletion status of a Task in a Goal  Route to Update the task status of goal  Route to add feedback  Route to add comment for goal  Route to Filter Goals Based on Specific Criteria  Route to filter goals and overwrite measurement  Route to filter goals and overwrite tasks  Route to overwrite measurement of goal collections  Route to overwrite tasks of goal collections  Route to send goal deadline alerts based on target completion date of my goals  Route to send task deadline alerts based on target completion date of that task of my goals | HR/Manager  HR/Manager  HR/Manager  HR/Manager  Employee  This route use by scheduler  HR/Manager  HR/Manager  HR/Manager  HR/Manager  HR/Manager  HR/Manager  HR/Manager  Employee  HR/Manager  HR/Manager  Employee  Employee  HR/Manager  HR/Manager  HR/Manager  HR/Manager  HR/Manager  HR/Manager  HR/Manager  This route is for scheduler  This route is for scheduler | included\_workers` or `excluded\_workers` are provided  eligibility profiles provided  eligibility profiles provided  Goal name, person name and other details  Goal name, employee name and other details  Scheduler send mail to manager or hr for approval with goal offering deatails  One goal, eligigibility profiles and other details  Goal plan details  Goals with eligibility profiles and goal plan details  Goal name with details to be updated  Goal name with measumentDetails  Goal name with task Details  Filter details and updation details  Goal details with progress update  Filter details and measument details  Filter details and task details    Person name, goal details and completion percentage of task  Person name, goal details and task status  Person name, goal details and feedback  Filter details and comment  Filter details  Filter details  and measurements details  Filter details  and tasks details  Goal name and measurements details  Goal name and tasks details  NA  NA | Success message or error  Success message or error  Success message or error  Success message or error  Success message or error  Success message or error  Success message or error  Success message or error  Success message or error  Success message or error  Success message or error  Success message or error  Success message or error  Success message or error  Success message or error  Success message or error  Success message or error  Success message or error  Success message or error  Success message or error  Success message or error |

**8.2 Example Workflow**

* **Example:** Assigning a Goal to an Employee
  + **Step 1:** The manager accesses the route /api/goal/assign.
  + **Step 2:**