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Preface

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Technical Configuration and Software Performance

For the latest information, refer to the *Taleo Enterprise Technical Configuration and Software Performance Guide* document for the applicable release.
# User Guide Revision History

<table>
<thead>
<tr>
<th>Date</th>
<th>Modification</th>
<th>Revised Topics</th>
</tr>
</thead>
<tbody>
<tr>
<td>September 13, 2013</td>
<td>Initial version.</td>
<td></td>
</tr>
</tbody>
</table>
Getting Started

- Accessing Taleo Performance
- Taleo Performance Basics
- Talent Browser
- Talent Search
Accessing Taleo Performance

Taleo Performance Login

Three scenarios are supported for logging in to Taleo Performance depending on your status: a user with an employee record, a user with an employee record and an HR-Admin role, or an employee with no employee record but with an HR-Admin role.

The status associated with your user name and password determines the scope of the tasks you can perform in Taleo Performance.

• You have an employee record.

  If you are a user who has an employee record, the rights associated with your status allow you to access your own information (performance review, succession plan and goal plan). When logging in to the application, you gain access to your profile automatically.

• You have an employee record and an HR-Admin role.

  By default, you have access to your profile automatically when you log in to the application; however, you can also see other employees’ information.

• You have no employee record, but you have an HR-Admin role.

  Because you have no employee record, you have access only to other employees’ information. Consequently, you have to specify whose information you want to consult. When you log in to the application, the system requests you to enter the appropriate information.

Logging In With an Employee Record

Logging in to the application as a user who has an employee record enables you to gain access to your information (performance review, succession plan and goal plan).

Steps

1. Select Taleo Performance from the product list window.
2. If a Legal Agreement window displays, you will need to accept it to be able to continue.

   You can also select the Remember my selection option to prevent further display of this agreement on the current computer.
3. From the User Sign In window, enter your user name and password. Click Sign In.
4. Taleo Performance opens and displays the Employee Center.

Logging In With an Employee Record and an HR-Admin Role

Logging in to the application as a user who has an employee record and an HR-Admin role allows you to access your information (performance review, succession plan and goal plan) and the information about other employees in the organization.

Steps

1. Select Taleo Performance from the product list window.
2. If a Legal Agreement window displays, you will need to accept it to be able to continue.
You can also select the Remember my selection option to prevent further display of this agreement on the current computer.

3. In the User Sign In window, enter your user name and password. Click Sign In.

4. Taleo Performance opens and displays the Manager Center.

Logging In With No Employee Record But With an HR-Admin Role

When you have no employee record but you have an HR administrator role, you must specify whose file you want to consult.

Steps

1. Select Taleo Performance from the product list window.
2. If a Legal Agreement window displays, you will need to accept it to be able to continue.

You can also select the Remember my selection option to prevent further display of this agreement on the current computer.

3. In the User Sign In window, enter your user name and password. Click Sign In.

4. Taleo Performance opens and displays the People Selector window.

5. Search for employees in your direct reports, your network or by a general keyword search.

6. Click the name of the employee whose file you want to consult and click Select.

Result

The Employee Center displays all the information available on the employee. All actions and security checks, however, are governed by the employee's rights and privileges. At any point, you can switch to another employee's file by clicking the name of the employee currently displayed in the top-left corner of the page.

Welcome Center

The Welcome Center is a home page that is displayed to users immediately after they log in and provides "one-click" access to Taleo products.

The Welcome Center contains an auxiliary navigation bar, a core navigation bar, a Quick Access panel, and a Communications panel.

- The auxiliary navigation bar contains links to additional resources such as the online help and the Sign Out link.
- The core navigation bar is a set of tabs that provide direct links to Taleo products. A user might have a tab for any or all of the following products: Performance, Recruiting, Compensation, Analytics, Learn, and Configuration.
- The Quick Access panel provides an alternative "one-click" access to the same products available in the core navigation bar and also provides a selection of modules within products for example, Onboarding, Transitions.
- Finally, Taleo clients can create information of interest to all Taleo product users in the organization for display in the central communications panel. Alternatively, they can create distinct sets of information and associate an information set with a configuration profile.

If the Welcome Center is enabled, it replaces the table of contents page.
Taleo Performance Basics

Taleo Performance Home Page

The Taleo Performance home page represents the Employee Center. Its dashboard-like interface with panels or sections provides information on tasks assigned, network members, and goal progress. Screens within the system can be accessed with one click to add and update data.

The left column contains a Quick Links panel whose content is based on your rights and permissions and provides links to information about you. Its content depends on the role you have.

If you are also a manager, the Manager Center panel provides links to information about your direct reports, as if you are an HR administrator, the HR Admin Tools panel provides links to administrative functions.

For optimal viewing, the magnification level of your internet browser must be set to 100%.

Following is a brief overview of the Home page components of Taleo Performance.

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Navigation ribbon provides a link to the Welcome Center and to your Taleo Performance home page.</td>
</tr>
<tr>
<td>2</td>
<td>Auxiliary navigation bar that gives access to various information such as setup configuration, online help, customer support, and product version. This bar also contains the Sign out option.</td>
</tr>
<tr>
<td>3</td>
<td>Keyword Search box and Advanced Search link.</td>
</tr>
<tr>
<td>4</td>
<td>Performance Card provides summary level performance information about an employee. It also allows access to the various functional areas of the application. The information available on the card is the same regardless of where it is accessed in the system.</td>
</tr>
</tbody>
</table>
My Tasks panel provides notification of tasks that have been assigned to you. The task list can be displayed by type, as well as be filtered by those that are overdue. Each entry includes a direct link to the page in the application that corresponds to the task.

My Network panel provides you with the ability to manage your network.

Quick Links panel that allows the user a quick access to his own information.

Manager Center panel that provides a quick access to manager functions.

My Career panel provides a quick view of your goals and their completion status.

### Navigation

Taleo Performance uses intuitive, graphical Object-Based Navigation which is more user-friendly than the traditional menu structure for navigating to information. For example, on the Performance Card, you can access a Go To menu that allows you to navigate to various pages about that person. The navigable list includes the Talent Profile, Performance Review, Goal Plan, Career Plan and Job Position Profile.

Taleo Performance provides an easy and intuitive way to interact with the system and the data you have so that you can eliminate the numerous clicks and navigation steps that are required in traditional applications. Taleo's one-click navigation allows you to navigate directly to information about a given employee by clicking a menu which expands when you click by the person's name. Other “objects” in the system such as business units or positions, have one-click navigation menus contextualized to reduce the amount of time spent navigating.

The Navigation Ribbon provides persistent links to the Welcome Center and the Taleo Performance home page. Smart Breadcrumbs are located at the top of the application and dynamically change as users navigate through the system. The Smart Breadcrumbs allow you to switch between actions similar to the Object Based Navigation. Managers can navigate between direct reports with a single click. Smart breadcrumbs also include buttons that return you to the Manager and Employee Centers.

Deep linking provides the ability to use the back and forward buttons of supported web browsers. Pages can also be bookmarked, enabling you to quickly return to popular pages.

When viewing the Manager Center, object based navigation menus distinguish items related to the individual (employee profile, goals, and reviews) from items related to the position the person is in (succession plan and position profile).

### Browser History

The browser history links provide the ability to quickly return to a previously viewed page of Taleo Performance, by clicking its name in the list of history links or in the list of recently viewed pages.

The browser history feature is available in all Taleo Performance modules and provides a detailed name of the page previously viewed, so users can easily identify the page to be displayed.

The link names all start with the application name. The second part of the link name reflects the page title. If the information is specific to a user, the user name will be identified in the link name. In the same way, if the page is related to a specific period or view mode, those will also be part of the link name.

Following are a few examples of browser history links:

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Browser History Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>Talent Profile</td>
<td>Taleo Performance - Talent Profile - &lt;employee name&gt;</td>
</tr>
<tr>
<td>Manager Center</td>
<td>Taleo Performance - Manager Center - &lt;employee name&gt;</td>
</tr>
<tr>
<td>Window Name</td>
<td>Browser History Link</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-----------------------------------------------------------</td>
</tr>
<tr>
<td>Journal</td>
<td>Taleo Performance - Journal</td>
</tr>
<tr>
<td>Job Position Profile</td>
<td>Taleo Performance - Job Position Profile</td>
</tr>
<tr>
<td>Job Role Profile</td>
<td>Taleo Performance - Job Role Information - &lt;role name&gt;</td>
</tr>
<tr>
<td>Goal Plan (in list mode)</td>
<td>Taleo Performance - Goal Plan - &lt;employee name&gt; - &lt;period&gt; - &lt;tab name&gt; - List view</td>
</tr>
<tr>
<td>Competency Goal Details</td>
<td>Taleo Performance - Competency Goal- &lt;goal name&gt;</td>
</tr>
<tr>
<td>Project List (in card mode)</td>
<td>Taleo Performance - My Projects - Card view</td>
</tr>
<tr>
<td>Performance Review</td>
<td>Taleo Performance - Performance Review - &lt;employee name&gt; - &lt;review request&gt; - &lt;element name&gt; - Compare view</td>
</tr>
<tr>
<td>Archived Activities</td>
<td>Taleo Performance - Development Plan - Archived Development Activities</td>
</tr>
<tr>
<td>Review Analytics</td>
<td>Taleo Performance - HR Administration Tools - Review Analytics</td>
</tr>
<tr>
<td>Succession Plan (in timeline mode)</td>
<td>Taleo Performance - Succession Plan - &lt;position name&gt; - Timeline view</td>
</tr>
<tr>
<td>Talent Pool (in matrix mode)</td>
<td>Taleo Performance - Talent Pool - &lt;pool name&gt; - &lt;tab name&gt; - Matrix view</td>
</tr>
<tr>
<td>Mentoring Center</td>
<td>Taleo Performance - Mentoring Center</td>
</tr>
</tbody>
</table>

### Accessing a Previously Viewed Page

**Steps**
1. In the tool bar of your browser window, open the list of recently viewed pages.
2. In the list of all the viewed pages, select the page that you wish to, return to or use the back and forward arrows to go back or forward one page at a time.

**Result**
The browser displays the page selected.

### Bookmarking a Page

**Steps**
1. Navigate to the page you want to add to your bookmarks (or favorites).
2. Choose the browser option to add a bookmark and choose the desired location.

**Result**
The selected page will be added to your bookmarks (or favorites) and will allow you to quickly return to that page later one.

### Accessing a Bookmarked Page

**Steps**
1. From your browser window, select the menu option that lists bookmarked (or favorite) pages.
2. Select the Taleo Performance page you wish to open.
3. If you are not already signed in, you will be presented with the Taleo login page to enter your credentials; otherwise, the desired page will be displayed. The selected page will open, directly if you are already signed in.
signed in, or after having entered your credentials in the Taleo login page if you were not already signed in.

**Result**

The selected bookmarked page is displayed.

**Deep Linking**

Deep linking provides the ability to use the back and forward buttons of supported web browsers, enabling you to quickly return to previously viewed pages.

Using the back and forward buttons of the browser means the internet browser behavior you expect to see is available when using Taleo Performance. This feature works at the higher module level, where different URLs are available, but does not differentiate between items within the module.

The following table lists the parts of Taleo Performance that support deep linking.

<table>
<thead>
<tr>
<th>Deep Linking Support Levels</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Page</strong></td>
</tr>
<tr>
<td>HR Admin</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Performance Review</td>
</tr>
<tr>
<td>Succession Plan</td>
</tr>
<tr>
<td>Employee Goals</td>
</tr>
<tr>
<td>Team Management</td>
</tr>
<tr>
<td>Development Plan</td>
</tr>
<tr>
<td>Mentoring</td>
</tr>
<tr>
<td>Common View</td>
</tr>
<tr>
<td><strong>Quick Links</strong></td>
</tr>
<tr>
<td>My Profile</td>
</tr>
<tr>
<td>My Career Plan</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>My Development Plan</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>
### Deep Linking Support Levels

<table>
<thead>
<tr>
<th>Page</th>
<th>Module</th>
<th>Component</th>
<th>Support Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recommendations</td>
<td></td>
<td></td>
<td>Full Support</td>
</tr>
<tr>
<td>Archived Development</td>
<td></td>
<td></td>
<td>Full Support</td>
</tr>
<tr>
<td>Activities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>My Mentoring Center</td>
<td>Mentoring Center</td>
<td>Full Support</td>
<td></td>
</tr>
<tr>
<td>My Performance Review</td>
<td>Review</td>
<td>Full Support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Tabs</td>
<td>No Support^</td>
<td></td>
</tr>
<tr>
<td>Business Goals</td>
<td>List Mode</td>
<td>Full Support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Time Line Mode</td>
<td>No Support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Details Perspective</td>
<td>Full Support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Living on the List Buttons</td>
<td>No Support</td>
<td></td>
</tr>
<tr>
<td>My Projects</td>
<td>List Mode</td>
<td>Full Support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Time Line Mode</td>
<td>No Support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Details Perspective</td>
<td>No Support</td>
<td></td>
</tr>
<tr>
<td>My Goals</td>
<td>List Mode</td>
<td>Full Support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Time Line Mode</td>
<td>No Support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Details Perspective</td>
<td>Full Support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Living on the List Buttons</td>
<td>No Support</td>
<td></td>
</tr>
<tr>
<td>General</td>
<td></td>
<td></td>
<td>Full Support</td>
</tr>
<tr>
<td>Manager Center</td>
<td>Career Plan</td>
<td>Career</td>
<td>Full Support</td>
</tr>
<tr>
<td></td>
<td>Job Role Profile</td>
<td>Full Support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Job Role Details</td>
<td>No Support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Search for Development Activities</td>
<td>No Support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Create an Activity</td>
<td>No Support^</td>
<td></td>
</tr>
<tr>
<td>Development Plan</td>
<td>Development</td>
<td>Full Support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Activity Details</td>
<td>Full Support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Recommendations</td>
<td>Full Support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Archived Development Activities</td>
<td>Full Support</td>
<td></td>
</tr>
<tr>
<td>Performance Review</td>
<td>Review</td>
<td>Full Support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Tabs</td>
<td>No Support^</td>
<td></td>
</tr>
</tbody>
</table>
Deep Linking Support Levels

<table>
<thead>
<tr>
<th>Page</th>
<th>Module</th>
<th>Component</th>
<th>Support Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Goals</td>
<td>List Mode</td>
<td>Full Support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Time Line Mode</td>
<td>No Support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Details Perspective</td>
<td>Full Support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Living on the List Buttons</td>
<td>No Support</td>
<td></td>
</tr>
<tr>
<td>Succession Plan</td>
<td>List Mode</td>
<td>Full Support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Compare</td>
<td>Full Support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Time Line</td>
<td>No Support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Matrix</td>
<td>No Support</td>
<td></td>
</tr>
<tr>
<td>Middle Panel</td>
<td>My Tasks</td>
<td>General</td>
<td>Full Support</td>
</tr>
<tr>
<td></td>
<td>My Career</td>
<td>General</td>
<td>Full Support</td>
</tr>
<tr>
<td>Right Panel</td>
<td>My Network</td>
<td>Network Contact List</td>
<td>Full Support</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Network People Picker</td>
<td>Full Support</td>
</tr>
<tr>
<td>Common View</td>
<td>Pop-up Windows</td>
<td>No Support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Performance Card</td>
<td>Full Support</td>
<td></td>
</tr>
<tr>
<td>Context Box</td>
<td>Home Button</td>
<td>Full Support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>People Selector</td>
<td>Full Support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Module Selector</td>
<td>Full Support</td>
<td></td>
</tr>
</tbody>
</table>

* Employee links are not supported.

^ Tabs are not supported, as they are contained within the page and cannot be separately linked.

Auxiliary Navigation Bar

The auxiliary navigation bar, located at the top right of pages, provides users with quick access to a collection of resources that they typically want to consult on occasion; resources not associated with a specific Taleo product. When enabled, the auxiliary navigation bar is visible and accessible at all times.

The auxiliary navigation bar can contain the following elements (provided they are enabled and users were granted access to them):

- **Home.**
  - If the user has access to multiple Taleo products and clicks the Home icon, the Welcome Center front page is displayed.
  - If the user has access to Taleo Recruiting only and clicks the Home icon, the Recruiting Center front page is displayed.
• If the user has access to Taleo Performance only and clicks the Home icon, the Employee Center front page is displayed.

• If the user has access to Taleo Onboarding only and clicks the Home icon, the Onboarding Center front page is displayed.

• If the user has access to Taleo Compensation only and clicks the Home icon, Compensation Center (Rewards Planning) front page is displayed.

• If the user has access to Configuration only and clicks the Home icon, the Configuration Center front page is displayed.

• **Resources.** Can include: My Setup, About, e-Learning, Web Support and Training. In addition, Taleo Performance includes Help Center.

• **Talent Grid.** Can include: Knowledge Exchange, Solution Exchange, Talent Exchange. Taleo clients who use only Taleo Performance have access to Knowledge Exchange only.

• **Sign Out.** Terminates the session and the user is automatically signed out of all Taleo products.

**Help Center**

The Help Center provides the standard online help for Taleo Performance. Access it from the Navigation toolbar at the top each page of the application. Click the Resources link and then select the Help Center option. The Help Center opens in a new window; providing a help content viewer with search, navigation and topic display capabilities. The Help Center feature is delivered enabled at implementation. There is no configuration required.

The Help Center topic content is the same as that delivered in the PDF versions of the Taleo Performance User and Configuration Guides, the main difference being the Help Center content is accessible from within the application.

Links to specific sections of the Help Center can be configured using the Customizable Online Help feature to display in the Supporting Tools pane of most Performance modules, providing a more contextual deployment of the standard content. This option is not available if you choose to use the Customizable Online Help feature to deploy your organization's own custom help content. For more information see *Customizable Online Help* and *Supporting Tools*.

**Supporting Tools**

The Supporting Tools feature displays as a pane on the right side of most modules of the Performance Application. It provides users quick access to Feedback, Fit Analysis or Attachments tools appropriate to the module or context. The Supporting Tools pane can also be configured to display customizable online help; either your organization's own custom help content, or selected sections of the delivered, standard online help.

Configuration of the default state of the Supporting Tools window (expanded or collapsed) is determined using the setting **Supporting Tools Displayed by Default** (in Configuration under the Global Settings category.) The setting controls the Supporting Tools window in all modules of Performance in which the window appears. When set to Yes the setting makes the Supporting Tools window open (or expanded) by default. When set to No the window is collapsed by default. No is the initial default value for this setting when the application is first opened. In either case the window also has an expand/collapse button that allows you to open or close the window as needed.

For more information see *Customizable Online Help* and refer to the *Taleo Performance Administration Guide* for configuration instructions.
Figure: The supporting tools pane is collapsible/expandable, and when expanded can display two tabs: Show Tools and Help.

**Customizable Online Help**

The Customizable Online Help feature provides your organization the ability to present contextual, customizable online help to your users. Configuration settings allow you to contextualize the presentation of online help at the Performance module level (reviews, goals, feedback, etc.). For each module you'll have the ability to display your organization's own custom content. Users will access it through the right side Supporting Tools pane which displays for each module. With this feature you can make available to your users, from within the application, your organization's relevant help content; such as internal policies and procedures, forms, and help videos.

**Customizable Online Help Versus Standard Online Help.**

**Customizable Online Help** - Is created by your organization, with your own content on your website or server. You can configure your URLs into Performance to display content in the right side Supporting Tools pane.

- It is the customer's responsibility to ensure their custom help is accessible to end-users if it is hosted on a server with restricted access.

**Standard Online Help** - Is the default Oracle Taleo Standard Online Help content, which can be displayed from the Supporting Tools pane. It can be contextual in the sense the content provided can be at the level in the documentation relevant to the application module.

- This is the same content as delivered in the main Help Center, the complete contents of which are accessible via the Resources link on the navigation toolbar at the top right of each page.

For more information see [Help Center](#).

**Display of Help in the Right Side Supporting Tools**

When activated in configuration, the right side Supporting Tools pane displays in the application module using a collapsible/expandable style.

- When the pane is collapsed the Help button always displays below the Show Tools button, if both are enabled.
- When the pane is expanded the Show Tools and Help display as tabbed frames, if both are enabled.

Here are some tips about the sizing of the custom help display window:

- The internal size of the HTML frame is adaptive to the window height and fixed in width to 177 pixels.
- Some websites use code that prevents them from being embedded within another frame.
- There are methods for creating web pages your organization can use to have your hyperlinks launch popup windows. These may present a better way to organize help content for display, such as having a main page of help topic links leading to separate popup pages for each help topic.
For more information see *Supporting Tools*.

With respect to the figure immediately above:

1. To access the entire Standard Online Help click **Resources > Help Center**.
2. To access the customizable/contextual Help click the **Help** button or tab in the right side Supporting Tools pane.

**Configuring the Customizable Help Display**

For each Performance system module there are a pair of corresponding configuration settings: Activation and URL. With these settings, the right side Supporting Tools pane for each module can be configured to one of three display options:

1. **No Help Display** - Use the Activation setting for a module to activate the display of the Help tab in the Supporting Tools pane. The default setting is No (false or deactivated).
2. **Customizable Online Help** - Use the URL setting to display your organization’s customized online help, by entering the URL path of the website where your content is stored into the applicable value field. Do this for each implemented language. This should be the path to the location where your policies, procedures, articles, video clips, etc. are accessible.
3. **Standard Online Help as a default** - Use the URL setting to display the default Standard Online Help, by copying the default URL for each implemented module and language (from a list provided at the bottom of the configuration page), and pasting it into the applicable Value field.

Customizable Online Help configuration settings are located at *Configuration[Taleo Performance]*

*Settings[Product Settings][Refine by] Category = Help*. For more information refer to the *Taleo Performance Administration Guide* for configuration instructions.

Example:

The following is an example of how the Customizable Online Help feature can benefit an organization:
1. The administrator of an organization has an internal website with URL links to help documentation their organization has created for modules of the Performance application (Reviews, Talent Profile, Succession, etc.).
2. The internal website also contains translations of this custom help content for all the languages they've enable in the Performance application, and the website is organized so content for each module and language combination is presented on separate HTML pages.
3. Since the content is organized by module and by language, and the URL’s to the website can be used to access the content via a popup window, the administrator configures the Performance application to display the URL links to the HTML pages, by module and by language.
4. The organization's users now have access to its custom help content in the Supporting Tools pane, contextually relevant to each configured module and language.

**Employee Center**

The Employee Center is the Home page of the application. It is comprised of a series of panels that provide information relevant to the employee.

Its dashboard-like interface with “panels” or sections provides information on tasks assigned, network members, and goal progress. Screens within the system can be accessed with one click to add and update data.

The **Navigation Ribbon** provides persistent links to the Welcome Center and the Taleo Performance home page. Down the left column are a series of quick-link panels that are shown based on the employees rights and permissions.

For all employees, the **Quick Links** panel provides links to information about the employee.

Depending on an employee's role, the view dynamically changes. For employees that are also managers, the **Manager Center** panel provides links to information about the manager's direct reports.

For employees that are also HR administrators, the **HR Admin Tools** panel provides links to administrative functionality.

The **My Tasks** panel provides the employee notification of tasks that have been assigned to them. The list of assigned tasks can be viewed based on task types and those that are past due. Each task provides a link to directly access the related task.

The **My Career** panel provides a quick view of the employee's goal and their completion status.

The **My Network** panel provides the mechanism to manage the employee's network. See the Networks topic for more information.

**Viewing Assigned Tasks**

Viewing assigned tasks from the My Tasks panel allows you to see all the tasks that have been assigned to you and that are not yet complete. You can filter the tasks by category or by those that are overdue.

**Prerequisite**

*Taleo Performance > My Tasks*

**Steps**

1. From the **My Tasks** panel, select a task category from the **Show** list to refresh the list.

   Only categories that have active tasks are displayed, along with the number of related tasks.

2. Select the **Display only overdue tasks** option and click **Refresh** to further filter the list.

3. From the list, select a task to display summary information.
If you do not have the required user permissions to complete the task a message is displayed.

4. Select the link within the summary information to go to the task.

Manager Center

The links in the Manager Center panel are used by managers to access different modules, from where they can complete tasks and view information about their employees.

Networking

Networking is a critical component of Taleo Performance. It provides the ability for users to share data with people in their network for the purpose of gathering feedback and providing input that may impact their performance ratings. My Network is a panel on the Employee Center that shows the list of individuals in the employee’s current network.

Networking provides the ability for users to share data with people in their network for the purpose of gathering feedback or for rating performance on specific items. Users can select others to be included in their network. For the purpose of performance reviews, managers will need to approve which network members are allowed to provide feedback.

From the My Network panel, a user can request feedback from one of their network members or they can choose to send unsolicited feedback to the employee.

Users established in My Network are leveraged when requesting feedback in each of the products. For example, when developing succession plans, a manager can request a member of his network to provide feedback on the plan or on specific members of the plan.

Network members can also be associated with tags that help identify them. A given network member can be associated with multiple tags. A list of tags allows the user to then quickly filter the members of their network by clicking on a single tag.

In addition to the Invitation-based network, the system will also present Dynamic Networks when requesting feedback on a specific item within the system. For example, when requesting feedback on a succession plan, the dynamic network would consist of managers and prior managers of individuals on the plan. The manager developing the plan could ask one of those managers to provide feedback.

Adding Network Contacts

Prerequisite

Taleo Performance

Steps

1. In the My Network section click Add to display the People Selector.
2. Select In my direct reports to find contacts by drilling down through your direct reports or By keywords to search based on name, email and job title.
3. Select the available employees name and click Select.
4. Enter a message for the contact and click Done.

Result

A network invitation is sent to the recipient.
Next Step

The employee reviews the invitation and if they accept the invitation, the sender is added to the recipient's network list. Regardless of whether they accept, you can still send feedback about the person.

Feedback

The Feedback module offers employees and managers the ability to ask colleagues to provide input and insight about an employee. For example, an employee can request feedback on a goal plan or individual goals and then share that feedback with his or her manager during the performance review process. A manager can request feedback on an employee from co-workers or other managers that have interacted with the employee.

Through feedback, Taleo Performance offers users the tools to provide information about an activity (such as a goal or review). It provides the flow of information back to an employee so that actual performance can be compared with planned performance. It works alongside networking to provide employees with the ability to create, maintain and leverage social networks for mentoring, coaching and learning.

Feedback Terminology

The following terms have specific, standardized meaning in relation to the Feedback module. They provide a foundation of consistent terminology for understanding and using Feedback Management.

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approver</td>
<td>The person who is requested to approve feedback (could be the same as Employee, Provider or Requester).</td>
</tr>
<tr>
<td>Context</td>
<td>The feedback subject, or type, indicating the focus of the feedback provided or asked for (e.g. Career Scenario, Competency, Development Activity, Employee Goal, General, Job Role).</td>
</tr>
<tr>
<td>Employee</td>
<td>The person who is the subject of the feedback, generally the person selected in the breadcrumbs at the top of the Feedback module page.</td>
</tr>
<tr>
<td>Provider</td>
<td>The person providing feedback (who could be the same as the Employee).</td>
</tr>
<tr>
<td>Recipient</td>
<td>The person who receives the feedback. If feedback is requested, the recipient is the same as the requester. Otherwise the recipient may be same as the provider, employee or direct manager.</td>
</tr>
<tr>
<td>Requester</td>
<td>The person requesting feedback (who could be the same as the Employee or Provider).</td>
</tr>
</tbody>
</table>

Feedback Tools

Generally, the feedback tools provided in Performance fall into two categories:

1. The Feedback module functions distributed globally throughout the application. These are discussed in this section of the documentation.
2. The Feedback page providing a consolidated view of a person's feedback. This is discussed in the two following sections of the documentation: Feedback Page and Results List.

The Feedback module is accessed from many other modules in Performance, for the purpose of providing feedback to an employee. All feedback is entered in the system and stored in the Feedback module. Feedback that is given to the manager is kept private from the employee.

Employee Center Quick Link
On the Employee Center, the Feedback quick link on the left side pane replaces the Feedback Journal link available in previous releases.

**Go To Dropdown List**

The Go To dropdown list provides the user an option to open the Feedback page from these locations in the application:

- Performance Card
- Performance Reviews > Individual Employee
- Search Results > Individual Employee
- Succession Plan > Successor Name
- Succession Plan Nomination Slate > Individual Employee
- Talent Browser Talent Car
- Talent Pools > Person Name
- Talent Snapshot

**Feedback from the Supporting Tools**

Users can request feedback through the Supporting Tools pane on the right of the application. The Feedback supporting tool is associated with these modules of Taleo Performance:

- My Development Plan
- My Performance Review
- My Goal Plan
- Succession Plan

The configuration setting for the default state of the Supporting Tools window (expanded or collapsed) is determined using the setting named **Supporting Tools Displayed by Default**. It appears in Configuration > Global Settings. The setting controls the Supporting Tools window in all sections of Taleo Performance in which the window appears.

When set to Yes the setting makes the Supporting Tools window open (or expanded) by default. When set to No the window is collapsed by default. No is the initial default value for this setting when the application is first opened. In either case the window also has an expand/collapse button that allows you to open or close the window as needed.

**Feedback from the Taleo Inbox**

From the Microsoft Outlook Inbox tool, users can request and capture feedback and supporting documents without logging into the application, when Taleo Inbox is also installed. That means most of the review content is already assembled at review time. Instead of writing the review, managers organize, compare, and synthesize the information.

**Feedback from the Task List**

Once users receive a feedback request, an entry is added to their Employee Center's task list. Then, if they want to provide feedback, they just open the task and they will be taken to the feedback reply screen. The feedback response form for goal, succession and career plans has been enhanced to provide additional and contextual details about the employee for whom feedback is requested to help the respondent to provide information. The feedback provider can also provide a rating for a goal.

**Provide Feedback Dialog**

In the Provide Feedback dialog the Feedback text entry box provides a maximum of 6,000 characters to accommodate more detailed and meaningful feedback. The entry area also has a character counter which dynamically displays, as you type, how many characters you have left or how many you are over the limit. The system allows you to continue typing once the 6,000 character limit is reached, but prevents you from sending the feedback when the number of characters is over the limit.

**Ask for Feedback Dialog**
When you use the Ask for Feedback button to request feedback about yourself or someone else, the system opens a dialog box allowing you to choose the person to request feedback from. The dialog also allows you to choose the **Context** of feedback requested (i.e. General, Career Scenario, Competency Goal, Development Activity, Employee Goal or Review). Depending upon the Context selected the dialog also allows you to specify whether the feedback is requested on all elements of the context or just specific ones. For example, you can ask for feedback for an entire career scenario or a specific career option within the scenario. Feedback requests do not expire. A feedback request cannot be canceled, but it can be rejected or deleted.

**Feedback - Available Actions from Other Contexts**

Feedback can be read, requested or provided from various locations in the application that is within specific contexts. The following table lists additional contexts where feedback actions are available:

<table>
<thead>
<tr>
<th>Module</th>
<th>Available Actions</th>
<th>Related message template for email notification</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Tasks</td>
<td>Reply to a feedback request.</td>
<td>No email notification available</td>
</tr>
<tr>
<td>My Network</td>
<td>Send general feedback to the employee who's card is selected.</td>
<td>No email notification available</td>
</tr>
<tr>
<td></td>
<td>Send general feedback to the manager of the employee who's card is selected.</td>
<td>No email notification available</td>
</tr>
<tr>
<td>Feedback</td>
<td>View received and sent feedback, and depending on configuration, also feedback about logged user.</td>
<td>Email notification not applicable for viewing</td>
</tr>
<tr>
<td></td>
<td>Provide general feedback about an employee, using a text entry area allowing up to 6,000 characters.</td>
<td>No email notification available</td>
</tr>
<tr>
<td></td>
<td>Request general or specific feedback about an employee or yourself, selecting the context and/or options within a context for feedback.</td>
<td>• Standard notification for a feedback request. • Standard notification for a response to a feedback request.</td>
</tr>
<tr>
<td></td>
<td>View pending feedback requests.</td>
<td>Email notification not applicable for viewing</td>
</tr>
<tr>
<td></td>
<td>Send Reminder for pending feedback requests.</td>
<td>Email notification sent as well as new task in Task List.</td>
</tr>
<tr>
<td></td>
<td>Print Feedback entries currently displayed in the Feedback page in a PDF format report.</td>
<td>Email notification not applicable for printing the report</td>
</tr>
<tr>
<td>Talent Browser</td>
<td>Send general feedback to the employee who's card is selected.</td>
<td>No email notification available</td>
</tr>
<tr>
<td></td>
<td>Send general feedback to the manager of the employee who's card is selected.</td>
<td>No email notification available</td>
</tr>
<tr>
<td>Career Plan</td>
<td>View general about the logged user and career plan feedback provided about the logged user's career plan.</td>
<td>Email notification not applicable for viewing</td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>Module</th>
<th>Available Actions</th>
<th>Related message template for email notification</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Request feedback about a career scenario or a specific career option.</td>
<td>• Standard notification for career plan feedback request  &lt;br&gt;• Standard notification for career plan feedback response</td>
</tr>
<tr>
<td>Development Plan</td>
<td>View general feedback about the logged user and feedback provided about development activities in the logged user's development plan.</td>
<td>Email notification not applicable for viewing</td>
</tr>
<tr>
<td></td>
<td>Request feedback about a development activity in the logged user's development plan.</td>
<td>• Standard notification for development plan feedback request  &lt;br&gt;• Standard notification for development plan feedback response</td>
</tr>
<tr>
<td>Goal Plan</td>
<td>View general feedback provided about the logged user and feedback provided about the goals or competencies in the goal plan of the logged user.</td>
<td>Email notification not applicable for viewing</td>
</tr>
<tr>
<td></td>
<td>Request feedback about the goals or competencies in the goal plan of the logged user.</td>
<td>• Standard notification for employee goal feedback request  &lt;br&gt;• Standard notification for employee goal feedback response</td>
</tr>
<tr>
<td>Performance Review</td>
<td>View general feedback provided about the logged user and feedback provided about the items in the performance review of the logged user.</td>
<td>Email notification not applicable for viewing</td>
</tr>
<tr>
<td></td>
<td>Request feedback about items in the performance review of the logged user.</td>
<td>• Standard notification for review feedback request  &lt;br&gt;• Standard notification for review feedback response</td>
</tr>
<tr>
<td>Succession Plan</td>
<td>Request feedback provided about the succession plan or about individual successors within the plan for the position of the logged user.</td>
<td>• Standard notification for succession plan feedback request  &lt;br&gt;• Standard notification for succession plan feedback response</td>
</tr>
<tr>
<td>Mentoring Center</td>
<td>Send feedback to mentee (protege).</td>
<td></td>
</tr>
</tbody>
</table>

**Feedback Page**

The **Feedback** page is the central location where a user has a consolidated view of all feedback items received or provided, whether completed or pending. They can filter feedback items to be viewed by date range, provider
and context. A user can also ask for general or specific feedback about themselves or another user, and provide general feedback about another user.

**Breadcrumbs Navigation**

The breadcrumbs navigation model is implemented on the Feedback page to standardize selection of the subject employee and navigation with other modules.

Breadcrumbs navigation is provided at the top of the Feedback page consistent with other Performance modules. The breadcrumbs display the current employee in effect. They provide you the ability to change the employee based on your security permissions and access. The Employee selected in the breadcrumbs determines the person who is the subject of, or involved in, the feedback items displayed in the Feedback module. The breadcrumbs also display the module you are currently working in (e.g. Feedback), and provides a selector allowing you to navigate to other modules in the system.

Employees only have access to feedback about themselves and all the feedback they provided. Managers have access to feedback about themselves and their direct reports. Feedback is not necessarily shown for everyone in your coverage area. The content displayed in the Feedback page’s Results List also depends on the following:

1. The configuration of the “Enable Public Access to Feedback” setting (i.e. Private or Public).
2. Primary filter settings selected in the left hand panel; by date range, Provider or Context.
3. The tab view selected: Received or Provided.
4. The secondary filter button selected for the tab view: Completed, Pending or Total.

![Figure: Several of the navigation, terminology, filtering and content presentation enhancements to the Feedback module are indicated.](image)

**Performance Card**

The top left side panel includes the Performance Card. The standard Performance Card is provided, consistent with the look and feel of other Performance modules. The content of the card is contextualized to reflect the employee selected in the breadcrumbs. A link to the Feedback module is added to the Performance Card, in all the modules the card is displayed.

**Feedback Primary Filters**

Primary filters are provided in the left side lower Filters pane. Filters are provided to set the parameters for data displayed in the Feedback module. Available filters are:

- Date Range
- **Provider**
- **Context (Performance module or feature)**

Date range always defaults to one prior to the current date; populates feedback items received and sent within the specified range; and also populates pending feedback requests with the due date within the specified range.

The filters apply only to the selected view or tab on the Results List, meaning they apply separately to the feedback received or provided views. The following table describes the functions of the filters:

<table>
<thead>
<tr>
<th>Filter</th>
<th>Filter Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Received/Sent From</td>
<td></td>
<td>This filter is used to see feedback starting at this date. By default, the date that corresponds to one year before the current date is entered.</td>
</tr>
<tr>
<td>Date Received/Sent To</td>
<td></td>
<td>This filter is used to see feedback ending at this date. By default, the current date is entered.</td>
</tr>
<tr>
<td>Provider</td>
<td></td>
<td>This filter is used to see feedback provided by a specific person. If you are viewing Received feedback, the Provider field defaults to blank, meaning feedback from all providers is displayed. Otherwise, you may narrow down the list by selecting a provider. If you are viewing Provided feedback, the Provider field is auto-populated with your name.</td>
</tr>
<tr>
<td>Context</td>
<td>Career Scenario</td>
<td>This filter is used to see feedback in relation to a specific context, which is selected from a dropdown list. The possible contexts are: Career Scenario, Competency, Competency Goal, Custom Item (in review), Development Activity, Employee Goal, General, Job Role and Review.</td>
</tr>
<tr>
<td>Context</td>
<td>Job Role</td>
<td>To see feedback provided in response to feedback requests sent from career plans, in relation to career scenarios.</td>
</tr>
<tr>
<td>Context</td>
<td>General</td>
<td>To see general feedback provided about employees, whether feedback was requested/provided from the Feedback page, My Network or a Performance Card in the Talent Browser.</td>
</tr>
<tr>
<td>Context</td>
<td>Development Activity</td>
<td>To see feedback provided in response to feedback requests sent from development plans, in relation to development activities.</td>
</tr>
<tr>
<td>Context</td>
<td>Employee Goal</td>
<td>To see feedback provided in response to feedback requests sent from performance reviews or from goal plans (Goals tab) in relation to employee goals.</td>
</tr>
<tr>
<td>Filter</td>
<td>Filter Option</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>----------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Context</td>
<td>Competency Goal</td>
<td>To see feedback provided in response to feedback requests sent from goal plans (Competencies tab) in relation to competency goals.</td>
</tr>
<tr>
<td>Context</td>
<td>Competency</td>
<td>To see feedback provided in response to feedback requests sent from performance reviews in relation to competencies that are part of reviews, but not drawn from goal plans. When the competencies are imported in reviews from goal plans, they are referred to as 'competency goals'.</td>
</tr>
<tr>
<td>Context</td>
<td>Review</td>
<td>To see feedback provided in response to feedback requests sent from performance reviews.</td>
</tr>
<tr>
<td>Context</td>
<td>Custom Item</td>
<td>To see feedback provided in response to feedback requests sent from performance reviews about items that are customer specific.</td>
</tr>
</tbody>
</table>

### Provide Feedback Toolbar Button

In the toolbar at the top left of the Feedback page, just below the breadcrumbs, the Provide Feedback button gives users the ability to send general feedback to other persons. When you click the Provide Feedback button the system first opens the People Selector dialog for you to choose the person(s) you want to provide feedback for. Once you select a person the Provide Feedback dialog opens. The Feedback text entry box allows for maximum of 6,000 characters to accommodate detailed and meaningful feedback. The entry area also has a character counter which dynamically displays, as you type, how many characters you have left or how many characters you are over the limit. Although the system allows you to continue typing once the 6,000 character limit is reached, a warning message displays if you try to send feedback that exceeds the limit. When you close the warning dialog your comments are still saved in the session and you can edit down the feedback until the count is under the limit. The system prevents you from sending the comments until the number of characters is reduced below the limit. When providing feedback, you also have the choice to send the feedback to another person for approval of the feedback.

### Ask for Feedback Toolbar Button

Also in the toolbar at the top left of the Feedback page, the Ask for Feedback button provides users the ability to request general or specific feedback about themselves or another person. When you click the button the Ask for Feedback dialog opens. If you are the employee in the breadcrumbs navigation, then the dialog recognizes the request is for about yourself. If you want to ask for feedback about another person, use the breadcrumbs (Employee dropdown selector) to choose the person. The Ask for Feedback dialog also allows you to choose the person you want to ask to provide the requested feedback. The dialog allows you to specify the **Context** of feedback requested: General, Career Scenario, Competency Goal, Development Activity, Employee Goal or Review. Depending on the context selected the dialog displays an additional section allowing you to specify whether feedback is requested on all elements of the context or just specific ones. For example, you can request feedback for an entire career scenario or specific career options within the scenario.

### Configuration

<table>
<thead>
<tr>
<th>Setting Name</th>
<th>Setting Description</th>
<th>Possible Values</th>
<th>Security Level</th>
<th>Setting Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feedback Requests</td>
<td>Use Ratings</td>
<td>Determines if the 5-star rating scale is</td>
<td>Never, Always (default)</td>
<td>Public</td>
</tr>
<tr>
<td>Setting Name</td>
<td>Setting Description</td>
<td>Possible Values</td>
<td>Security Level</td>
<td>Setting Category</td>
</tr>
<tr>
<td>------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
<td>----------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>Security Level</td>
<td></td>
<td>Ask user - an additional option is shown on the Request Feedback form for the user to specify whether to allow or not the target recipients to provide rating information as part of the feedback</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enable Public Access to Feedback</td>
<td>The feedbacks a user can see depend on this setting. When Private feedback is enabled the user sees feedback entries only when they are the author or recipient of the feedback. When public feedback is enabled, the user also sees all feedback provided about themselves or their direct reports.</td>
<td>Yes, No (default)</td>
<td>Public</td>
<td>Feedback</td>
</tr>
<tr>
<td>Enable Feedback Approval</td>
<td>This setting enables feedback approval and controls if the approver selector and details are displayed. It also controls the activation of the approval workflow mechanism. Also when set to yes, the Status column is available in the Sent view of the Feedback Journal.</td>
<td>Yes, No (default)</td>
<td>Public</td>
<td>Feedback</td>
</tr>
<tr>
<td>Allow Feedback Deletion</td>
<td>Indicates whether it will be possible for the user to remove feedback entries from the feedback journal or not.</td>
<td>Yes (default), No</td>
<td>Public</td>
<td>Feedback</td>
</tr>
</tbody>
</table>
Feedback Results List

The Feedback page’s Results List is the central location where a user has a consolidated view of all feedback items received or provided, whether completed or pending. The feedback items you can view depends upon your permissions. The list presents feedback items in a grid having rows and columns, with a separate row for each feedback item. Columns are fields summarizing details about the feedback items. The grid provides immediate access to all feedback an employee has received about themselves and provided about other people, see what’s pending and send reminders.

Feedback items presented in the Results List are subject to filtering by the following:

1. The configuration of the "Enable Public Access to Feedback" setting (i.e. Private or Public).
2. The employee selected in the breadcrumbs at the top of the page is the subject of the feedback.
3. The Date Range, Provider and Context filters in the left side Filters pane.
4. The Feedback view or tab selected (Requested or Provided).
5. The contextual or secondary filter button selected at the upper right of the Results list.

Received and Provided Tabs for Feedback Views

When you access the Feedback page, and the employee selected in the breadcrumbs is yourself, two default views are displayed for the Results List (Received and Provided). They are controlled by tabs with the same name at the top of the Results List. The tabs provide the ability to present feedback items in two separate views (Received and Provided), contextualizing the items displayed in the module. Both views display feedback items for My Feedback.

- **Received** - Displays received feedback received about yourself, solicited or unsolicited; pending requests for feedback about yourself (requested by yourself or someone else); and requests for feedback about yourself (requested by yourself or someone else) that are pending approval.

- **Provided** - Displays all solicited and unsolicited feedback where you are the author: provided by yourself; pending requests for feedback you were asked to provide; and feedback you provided that are pending approval.

When the employee selected in the breadcrumbs is another employee (not yourself), the view in the Results list is for feedback items received about the other employee. No tabs are displayed at the top of the Results List.

Feedback Module Columns Based on Views

Fields (columns) displayed in the Results List are organized to put the focus on the employee selected in the breadcrumbs. The following fields (columns) are displayed in the list based on the view selected.

<table>
<thead>
<tr>
<th>Tab (View)</th>
<th>Fields (Columns)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Received</td>
<td>Context, Provider, Rating, Feedback, Date, Status and Importance flag.</td>
</tr>
<tr>
<td>Provided</td>
<td>Employee, Context, Requester, Rating, Feedback, Date and Status.</td>
</tr>
</tbody>
</table>

The list can be sorted by any column, except the Feedback and Status columns, in ascending or descending order.

Contextual Secondary Filter Buttons

A group of three buttons (Completed, Pending and Total) are provided at the top right of the Feedback Results List. The buttons are visible in each of the two main views for the Results List (Received and Provided). They
show counts of the number of lines in the journal for each of those categories. When clicked they serve as contextual or secondary filters within the selected view, displaying a subset or all of the line items in the view. The result set displayed in the list is reduced to line items meeting both the view criteria and the secondary filtering criteria of the chosen button. For example, if the view is set to Received, and you click the Completed button, the result set includes only those feedback items that are actually Received about yourself or a specified person, and not those items that are Pending.

**Feedback Item Deletion**

If feedback deletion is allowed through configuration, users will be entitled to remove received feedback from the Feedback results list.

**Feedback Item Approval**

If feedback approval is enabled the *Status* column indicates approval status. If the status is *Rejected*, the author of the feedback can make edits and resubmit the feedback for approval from the Feedback page. When approval is enabled, the Date field corresponds to the date the feedback is approved or rejected.

**Visual Cues to Distinguish Pending Items on Feedback Journal**

The Feedback Journal displays line items for pending feedback requests in italicized bold text to readily distinguish from received feedback items. Pending items which are past their due date display italicized red text in the Date field.

**Send Reminder Option for Pending Items on Feedback Journal**

Users have the ability to send a reminder for pending items from within the Feedback Journal. Right-click on the Feedback column for any pending item in the Results List and select the Reminder option to prompt the person about your feedback request. The person you send the reminder to receives both a message from you in their Employee Center's My Tasks list, and an email reminder.

**View Feedback Received or Requested from within the Module**

Use the Received tab to display requested or received feedback items, whether Completed or Pending. The Feedback column displays the first line of any completed feedback content, from directly within the Results List, without having to open the feedback item. Upon mouse over a tooltip displays more of the feedback item. View the entire contents of the provided feedback by choosing *View Details* from the Feedback action menu, or by selecting More in the tooltip window.

The Feedback column displays the text *Pending* for any requested feedback items awaiting a response or an approval. This serves as a visual cue that you can choose the *Remind* option from the Feedback column action menu and send a reminder to the person who needs to provide the feedback. Once a reminder is sent, the date of the reminder appears in the status column.
With respect to the figure immediately above:

- **A.** - The first line of feedback displays in the Feedback column. If the feedback is longer than the area provided, hover the cursor over the feedback and a popup tooltip provides more detail.

- **B.** - Another way to view feedback is to click on the contextual dropdown button and select View Details from the action menu. This opens the Feedback Details dialog. Within the Feedback Details dialog the Additional Details section can be collapsed to provide greater viewing area for Feedback.

**View and Provide Feedback from within the Module**

Use the Provided tab to display feedback provided, and requests for you or others to provide feedback, whether they are Completed or Pending. The Feedback column displays the first line of any completed feedback content, from directly within the Feedback module, without having to open the feedback item. Upon mouse over a tooltip displays more of the feedback item. View the entire contents of the provided feedback by choosing View Details from the Feedback column action menu, or by selecting More in the tooltip window.

When feedback is requested from you, but is not yet provided, the Feedback column displays a visual cue stating Pending. The Date column also displays Due and the date your feedback is due. These visual cues serve to alert you to follow the Feedback column action menu's Respond link and provide the requested feedback.

**Provide Feedback Screen**

When using the Provide Feedback screen, providers are prompted to use the People Selector dialog to select an employee. Once the Provide Feedback dialog is open, providers also have the ability to click the Change link to reopen the People selector, from where they can choose a different employee to provide feedback about, if desired.

When the "Enable Public Access to Feedback" setting is configured to Private, the Provide Feedback screen displays two checkboxes: Visible to Manager and Visible to Employee. When the setting is configured to Public, the two checkboxes are not displayed.

**Suggestive Actions on Dialog Screens**
For dialog screens such as Provide Feedback, Ask for Feedback and others, the button for the next logical prominent action is highlighted. This does not prevent you from executing other active actions.

**Collapse Additional Details when Providing Feedback or Approval**

When responding to a feedback request using the Feedback Details screen, or providing approval in the Feedback Approval screen, the user can collapse or expand the Additional Details field. This provides flexibility for increasing the edit area of the Feedback field, when needed.

In addition, when responding to a feedback request using the Provide Feedback dialog, the removal of the Due Date and Priority fields from the Overview screens provides more vertical room for increasing the height of the Feedback and Additional Details fields.

At the bottom of these dialog screens a series of buttons (Save, Previous, Next, Send and Cancel) are provided to advance and return through the editing and approval processes.

**Filtering Feedback Items on the Feedback Page**

**Prerequisite**

The feedback items you can view on the feedback page are subject to:

- the configuration of the "Enable Public Access to Feedback" setting (i.e. Private or Public).
- the employee selected in the breadcrumbs at the top of the page.

For more information refer to [Feedback Results List].

**Performance > [Quick Links] Feedback**

**Steps**

1. You can view feedback items in the results list in one or more views: received or provided. Use the tabs at the top of the results list to select a view.

2. To further filter the feedback items displayed in the Results List, use the primary filters in the left side Filters pane: Date From/To, Provider, Context.

   When no filters are defined, the list shows all feedback for the selected view: received or provided.

   Note the filters apply to one view at a time only (i.e. to the feedback received or provided).

   - To clear all default filters, click [ ]

   - Once filters have been selected, click [ ] for the feedback journal list of entries to be updated according to your filter options.

3. If you want to further filter the entries displayed in the journal, use the three secondary filter buttons (Complete, Pending and Total) provided at the top right of the results list.

   The buttons show counts of the number of lines in the results list for each of the categories. When clicked they serve as secondary filters within the view, providing a subset of the line items in the view. The result set displayed in the journal is reduced to line items meeting both the view criteria and the secondary filtering criteria of the chosen button.

**Result**

The feedback result list will show all feedback items corresponding to your various private/public access, employee selection, tab/view, primary filter and secondary filter options.
**Viewing All Feedback You Received**

**Prerequisite**

The feedback items you view on the feedback page are subject to:

- the configuration of the "Enable Public Access to Feedback" setting (i.e. Private or Public).
- the employee selected in the breadcrumbs at the top of the page must be yourself.

For more information refer to [Feedback Results List](#).

**Performance > [Quick Links] Feedback**

**Steps**

On the Feedback page, select the **Received** tab at the top of the results list.

The results list displays feedback received about yourself, solicited or unsolicited; pending requests for feedback about yourself (requested by yourself or someone else); and requests for feedback about yourself (requested by yourself or someone else) that are pending approval.

**Viewing All Feedback You Provided**

**Prerequisite**

The feedback items you view on the feedback page are subject to:

- the configuration of the "Enable Public Access to Feedback" setting (i.e. Private or Public).
- the employee selected in the breadcrumbs at the top of the page must be yourself.

For more information refer to [Feedback Results List](#).

**Performance > [Quick Links] Feedback**

**Steps**

On the Feedback page, select the **Provided** tab at the top of the results list.

The results list displays solicited and unsolicited feedback provided where you are the author: provided by yourself; pending requests for feedback you were asked to provide; and feedback you provided that are pending approval.

**Viewing All Feedback about a Direct Report**

**Prerequisite**

The feedback items you view on the feedback page are subject to:

- the configuration of the "Enable Public Access to Feedback" setting (i.e. Private or Public).

For more information refer to [Feedback Results List](#).

**Performance > [Quick Links] Feedback**

**Steps**

In the breadcrumbs at the top of the page, the Employee selection defaults to yourself. Click the dropdown button and set the employee to one of your direct reports.

When the employee selected in the breadcrumbs is another employee (not yourself), the view in the Results list is for feedback items received about the other employee. No tabs are displayed at the top of the Results List.
Sorting Feedback in the Results List

Prerequisite
The feedback items you can view on the feedback page are subject to:

• the configuration of the "Enable Public Access to Feedback” setting (i.e. Private or Public).
• the employee selected in the breadcrumbs at the top of the page.

For more information refer to Feedback Results List.

Steps
1. To sort the list of feedback items according to a given column, you only need to click on the column header to sort in a ascending or descending order.
   It is possible to sort by all column, except by Feedback and Status.
2. To reverse the order, click again on the same column header.

Result
Feedback will be sorted by the selected column, across all results list pages.

Providing General Feedback from the Talent Browser

Prerequisite
Performance > [Quick Links] Talent Browser

Steps
1. From an employee's performance card, select to display the Go To menu.
2. Select Send Feedback to the Employee or Send Feedback to the Manager, depending on the desired recipient.
3. In the Provide Feedback dialog enter your feedback in the text box and format the text as needed.
   The text entry area allows for a maximum 6,000 characters. A counter lets you know how many characters
   you have left or are over the limit. Once you have reached the limit you can continue typing and editing,
   but the system will not allow you to save if the count is over the limit.
4. Optional. In the Approval section you can select an approver, if desired.
5. When input is complete, click Send.

Result

Providing General Feedback from My Network

General feedback is not related to any specific context and can be sent without having received a request for it.

Prerequisite
Performance > [My Network]

Steps
1. From the My Network panel, the feedback actions are available from the pull-down menu adjacent to each name.
2. You can select Send Feedback to the Employee or Send Feedback to the Manager, depending on the desired recipient.
3. In the **Provide Feedback** dialog enter your feedback in the text box and format the text as needed.
   The text entry area allows for a maximum 6,000 characters. A counter lets you know how many characters you have left or are over the limit. Once you have reached the limit you can continue typing and editing, but the system will not allow you to save if the count is over the limit.
4. Optional. In the Approval section you can select an approver, if desired.
5. When input is complete, click **Send**.

**Result**

**Providing General Feedback from the Feedback Page**

Feedback provided via the Feedback page is always unsolicited and not related to any specific context. Unsolicited feedback provided from the Feedback page can only be sent to the person the feedback is about and the manager of that person.

**Prerequisite**

*Performance* &gt; [Quick Links]

**Steps**

1. In the Feedback page click **Provide Feedback**.
2. In the **People Selector**, select the person about whom you want to provide feedback and click **Select**.
3. In the **Provide Feedback** dialog enter your feedback in the text box and format the text as needed.
   The text entry area allows for a maximum 6,000 characters. A counter lets you know how many characters you have left or are over the limit. Once you have reached the limit you can continue typing and editing, but the system will not allow you to save if the count is over the limit.
4. Optional. In the Approval section you can select an approver, if desired.
5. When input is complete, click **Send**.

**Replying to a Feedback Request from My Tasks**

**Prerequisite**

Feedback needs to have been requested for an item for a user to be able to reply.

*Performance* &gt; *Employee Center* &gt; *My Tasks*

**Steps**

1. In **My Tasks** panel, use the selector to choose the **Feedback Request** category.
2. Click on the appropriate task to select and highlight it.
   A task summary displays just below.
3. Click **** to open the feedback reply form.
4. In the reply form, click **Start**.
5. For each item in the feedback request:
   a) Provide your feedback in the comment box.
   b) Provide a rating if requested by the sender.
   c) Enter an approver if appropriate.
6. Use the **Next** and **Previous** buttons to navigate to other items in the feedback request.
7. When feedback has been provided for all requested items, save the provided information and click **Finish and Send**.
Result
The feedback is sent to the person who requested it and an email notification will be sent to that person if such notification was set to be sent. The feedback request task is also removed from My Tasks.

Replying to a Feedback Request from Results List

Prerequisite
Feedback needs to have been requested for an item for a user to be able to reply.

Performance [Quick Links] Feedback

Steps
1. Click the Provided tab to populate feedback items for that view into the Results List.
2. Click the Pending button.
   The results list is pared down to just pending feedback requests.
3. Select the appropriated feedback item.
4. In the Feedback column for the item click the dropdown list and select Respond from the Action menu.
5. In the reply form, click Start.
6. For each item in the feedback request:
   a) Provide your feedback in the comment box.
   b) Provide a rating if requested by the sender.
   c) Enter an approver if appropriate.
7. Use the Next and Previous buttons to navigate to other items in the feedback request.
8. When feedback has been provided for all requested items, save the provided information and click Finish and Send.

Result
The feedback is sent to the person who requested it and an email notification will be sent to that person if such notification was set to be sent. The feedback request task is also removed from My Tasks.

Removing Feedback from the Feedback Page

Prerequisite
Removing feedback is only possible when the setting Allow Feedback Deletion has been set to Yes. When allowed, the Remove action is available; otherwise, it's not.

Feedback can only be removed from the Received feedback view. It cannot be removed from the Provided view.

Performance > [Quick Links] Feedback

Steps
1. In the Feedback page, select the Received tab/view.
2. As needed, refine the list by using the available filters and sort in order to locate the feedback to delete.
3. Once the feedback item is found, click the dropdown list in the Feedback column and select Remove from the Action menu.
4. Click Yes to confirm the action.

Result
The feedback will be removed from the list of received feedback in the Results List. If you are entitled to view feedback about yourself or about your direct reports coming from anybody, the feedback will only be removed
from your list of received feedback, therefore preventing a feedback sent or received by someone else from
being deleted from your Feedback page.
Both the sender and the recipient must remove a feedback from their received views for it to be removed from
both person’s received views.

Flagging Feedback as Important

Prerequisite

Performance > [Quick Links]

Steps

1. On the Feedback page, select the Received tab at the top of the results list.
The results list displays feedback received about yourself, solicited or unsolicited; pending requests for
feedback about yourself (requested by yourself or someone else); and requests for feedback about yourself
(requested by yourself or someone else) that are pending approval.
2. Locate the feedback item you want to flag as important, click the dropdown button in the Feedback
column, and select Mark as High Importance from the Action menu.

Result

A red flag will display in the Important column for the selected feedback item.

Requesting General or Specific Feedback from Feedback Journal

Prerequisite

• Feedback requested via the Feedback page can be requested specifically about a context (category) of
information (General, Career Scenario, Competency Goal, Development Activity, Employee Goal or
Review).
• Requesting feedback from other employees in the organization can enable you to make a better evaluation
of an employee’s proficiency regarding a goal, a competency or a custom item and help you make a
decision regarding a development activity to undertake.

Performance > [Quick Links] Feedback

Steps

1. In the Feedback page, click Ask for Feedback.
In the Ask for Feedback dialog the name of the person who you want to request feedback about displays
at the top. The Change link displays to the right of the name.
2. If you want to request feedback about a different person, click Change to open the People Selector dialog
and select the person.
3. In the Ask for Feedback dialog select the person who you want to provide the feedback.
4. Use the Context selector to indicate whether the feedback requested is general or specific for a particular
context: General, Career Scenario, Competency Goal, Development Activity, Employee Goal or Review.
You can also specify a certain option within a context, where items are available. For example, within a
Career Scenario you can limit the feedback to a particular career option.
5. Specify a due date as well as the priority level for the feedback.
6. In the comment box, edit the default message and format the text if as needed.
7. When input is completed, click Send.
Result

The recipients will receive a feedback request in their *My Tasks* panel. Also, an email notification will be sent if such notification was configured.

Feedback Report

Employees and managers are able to print the Feedback results list, including pending feedback requests, to a PDF format Feedback report. Employees are able to generate a Feedback report for themselves, while managers can generate reports for themselves and their employees.

**Printing the Feedback Report**

When you click the Print Button on the toolbar at the top of the Feedback page, feedback items currently displayed in the selected view are printed to a PDF format report. The Feedback report captures the information available within the context of the Feedback page and results list at the time you run the report. The feedback you see depends on the filters applied to generate the results list:

1. The configuration setting *Enable Public Access to Feedback*.
2. The employee selected in the breadcrumbs at the top of the page.
3. The view selected (Received or Provided).
4. The primary filters selected: Date Range, Provider and Context.
5. The secondary filter selected at the top of the journal list (Complete, Pending and Total).

The generated PDF version of the feedback report can be viewed online, printed, or saved to a local machine using the functionality of your chosen browser. Saved copies can be attached to other sections of Taleo Performance; such as Reviews and Goal Plans.

**Feedback Report Output**

The first page of the printed Feedback report includes the name, photo and contact details of the person printing the feedback. At the upper right the print date format is fixed and always displays the timezone of the print server, which may not match your timezone. The main body of the Feedback report provides information about feedback items that is context sensitive to the settings for the Feedback page when you printed the report. When you are printing a view that includes pending feedback, it will display a separate entry for each person who has been sent a feedback request. For example, if ten people are sent feedback requests on a single subject at the same time, and eight of them are still pending, the report will include individual entries for each of those eight people.
Figure: A few of the terminology and content presentation features of the Feedback report are indicated.

Feedback Report Content Determined by Journal View Context

The following table shows how the fields that display in the Feedback report are determined contextually, depending upon the view selected for the results list.

<table>
<thead>
<tr>
<th>View setting (tab at the top of the results list)</th>
<th>Feedback Report Title (in Feedback report)</th>
<th>Feedback Section Fields (in Feedback report)</th>
<th>Pending Section Fields (in Feedback report)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Received</td>
<td>Feedback Received About</td>
<td>Context, Provider, Rating, Feedback. Date, Status, Importance Flag.</td>
<td>Context, Rating, Provider, Feedback.</td>
</tr>
</tbody>
</table>

To Print a Feedback Report

Prerequisite

- You want to print feedback items listed in the Feedback page's results list.
- You must apply appropriate selection and filtering values to the Feedback page such that feedback items display in the results list. Otherwise, no entries will populate the Feedback report.

Performance > [Quick Links] Feedback

Steps

1. Click on the Feedback page toolbar.
The Feedback report is contextual, the system includes only the feedback entries you see on the results list at the time you print the report. The system generates a PDF format report of the entries in the journal view and displays the report on the screen.

2. Use your browser’s Save and Print functions to download a copy of the report to a local machine, or print a copy of the report, respectively.

Result
A PDF is generated, which can be saved or printed.

Print Feedback Report Scenarios
The following table provides examples of view and filter selections for common feedback report scenarios:

<table>
<thead>
<tr>
<th>Scenario</th>
<th>View Selector</th>
<th>Filter Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print all received feedback about yourself.</td>
<td>Received</td>
<td>You are the employee selected in the breadcrumbs.</td>
</tr>
<tr>
<td>Print all provided feedback by yourself.</td>
<td>Provided</td>
<td>You are the employee selected in the breadcrumbs.</td>
</tr>
<tr>
<td>Print all received feedback about one of your employees.</td>
<td>Received</td>
<td>The employee selected in the breadcrumbs is another employee. Use secondary filter button Total.</td>
</tr>
<tr>
<td>Print all feedback requests you have sent that are pending.</td>
<td>Provided</td>
<td>You are the employee selected in the breadcrumbs. Use secondary filter button Pending.</td>
</tr>
</tbody>
</table>

Feedback Approval
This allows feedback to be reviewed and approved before being sent to recipients.

Feedback approval consists of the following:

- approval can be requested when responding to a feedback request or when providing unsolicited feedback
- the person providing feedback has the option to select anyone as the feedback approver
- requesting feedback creates an approval task for the approver, subsequently rejecting feedback creates a resubmit task for the provider
- notification of feedback approval and rejection tasks can be displayed in Taleo Inbox
- selecting an approver is optional, not selecting one sends the feedback directly to the recipient

To Get Feedback Approved
Prerequisite

Enable Feedback Approval configuration setting is activated.

Steps
1. From My Network, Go To menu, Supporting Tools, or the Feedback Journal choose to send unsolicited feedback about an employee, or from My Tasks select a feedback request.
2. After entering feedback, click 💼 for the Approver field and select who should receive the feedback.
When providing feedback for a module, such as a performance review, you must first select Approval from the left-side menu.

3. Click Send and an approve feedback request is sent to the approver.

4. From their tasks list, the approver selects the Approve feedback request to display the feedback.

5. If the feedback is acceptable, the approver clicks Approve Feedback and the feedback is sent to the recipients.

6. If the feedback isn't acceptable, the approver can add comments and click Reject Feedback to create a Review Feedback Rejected task for the sender.
   The feedback is not sent to the recipient.

When approving feedback for a module, such as a goal plan, first Approval must be selected from the left-side menu.

7. Select the task to access the feedback and view the rejection reason to learn why it was rejected, then make the required changes and return to Step 3 to continue the process.
   You can resubmit the feedback to a different approver.

360° Feedback Assessment

Taleo provides 360° Feedback functionality by partnering with third party vendors. The currently available integration is DDI's Leadership Mirror.

360° Feedback assessment is a service offered to clients through a Service Activation Request process. This service is made possible through the Taleo Passport component, which is the development toolkit to help build the certification or interfaces with a specific business partner.

Upon proper partner certification, configuration and availability, users can view information in Taleo Performance related to current and past assessments. Access to the assessment information is provided through the Assessments page. This page has been designed to store information related to this 360° integration as well as to any future assessment integrations done in Taleo Performance. Users can access assessments in the following ways:

<table>
<thead>
<tr>
<th>Link Name</th>
<th>Link Displayed When:</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quick Links</td>
<td>My Assessments</td>
<td>This link allows employees to consult their own assessments.</td>
</tr>
<tr>
<td></td>
<td>• There are external partners certification enabled AND</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• The user has access to Employee Profile (at least ownership level)</td>
<td></td>
</tr>
<tr>
<td>Manager Center</td>
<td>Assessments</td>
<td>This link allows entitled users to consult their reports' assessments.</td>
</tr>
<tr>
<td></td>
<td>• There are external partners certification enabled AND</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• The user has access to Employee Profile (at least direct manager level)</td>
<td></td>
</tr>
<tr>
<td>Performance Card - Contextual Menu (Go to Menu)</td>
<td>Assessments</td>
<td>• There are external partners certification enabled</td>
</tr>
</tbody>
</table>
The Assessments page displays all active external partners and provides a summary of the requests where the user in context is the subject:

- Assessments are grouped by type and each type has its own section.
- Then each type can present multiple assessments provided by various partners.
- For each assessment, Taleo provides the following information:
  - Request Date
  - Status of the request in the partner's system
  - Summary message provided by the partner (determined during certification)
  - Detailed information, such as System Status, Expiration Date, Last Activity Date and Reference Numbers
  - Various information and links to perform different actions, depending on the status of the survey. Example items that can be determined as part of the certification are as follows:

<table>
<thead>
<tr>
<th>Link</th>
<th>Survey Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Survey</td>
<td>Open or In Progress</td>
<td>Allows the user to view the survey on the partner site, identify the raters to launch the survey and self-evaluate the survey.</td>
</tr>
<tr>
<td>View Survey Progress</td>
<td>In Progress</td>
<td>Allows the user to view the survey progress.</td>
</tr>
<tr>
<td>View Survey Report</td>
<td>In Progress or Completed</td>
<td>Allows the user to access a final survey.</td>
</tr>
</tbody>
</table>

**To view 360° feedback assessment**

**Prerequisite**

*Performance > [Quick Links] > My Assessments*

*Performance > [Manager Centers] > Assessments*

**Steps**

1. If you are a manager, select the employee whose assessment you want to view, otherwise proceed to step 2.
2. Click Details next to the assessment you want to view and the Details page displays the request date, provider status, and summary. If available, click the More link to display additional information about the assessment, such as internal and external reference numbers.
3. For an assessment survey that is still in progress, you can click Access Survey Details to launch a new window that takes you to the assessment provider where you can view the survey.
4. For an assessment survey that is complete, you can click Access Survey Reports to launch a new window displaying the completed assessment survey.
NOTE: Different assessment providers have different workflows and functionality. The assessment provider should have specific information for your implementation.

Talent Profile

The Talent Profile summarizes and represents the employee's record within Taleo Performance. It contains general information about the employee drawn from the employee's user account; as well as metrics, review history, compensation, competency, employee, education, work experience, certification and job preference information. Generally the sections of the talent profile are highly configurable. Custom sections can also be configured by system administrators and added to the Talent Profile.

User types, Visibility Groups and Access to the Talent Profile

The Talent Profile is intended to be viewable by the employee and their managers. Depending on configuration they will be able to see all or some of the available fields in the Talent Profile sections. Depending upon the implementation employees will have the ability to edit some of the information presented in their profile.

User Types

A user's access to Talent Profile sections is subject to user type permissions security. There are the following Talent Profile-related user type functional domains:

- Employee Metrics: Access to employee metrics and user-defined employee metrics and access to the General section.
- Employee Profile: Access to Talent Profile standard and custom sections.
- Performance Review: Access to Review History and General Sections.
- Compensation: Access to Compensation and General Sections.

Visibility and Availability Groups

A visibility group is simply a subset of the employees in your organization. For example, you might want to define a group for American senior executives. The visibility group would be defined using Location equals USA, and Job Level equals Senior Executives.

The Visibility and Availability Groups feature, configured in the Talent Profile Layout pages, provides a second tier of security at the Talent Profile section level. Visibility groups work in addition to the User Type permissions security, which takes precedence. The visibility group configurations allow an administrator to further restrict access to talent profile sections. Sub-sections inherit the section security. Visibility groups can be applied in all Talent Profile section configurations, with exceptions for General and Competencies:

- The General section has no section level availability configuration, as it is always available. It also does not support the control of section visibility, nor does it have field level visibility configuration.
- The Competencies section does have section level availability configuration, but not section visibility control. Competencies do have role-based, field level visibility configuration.

For more information about configuring User Types and Visibility Groups see the Oracle Taleo Performance Administration Guide.

Viewing and Editing the Talent Profile

The following represents a general business process overview for viewing and editing the Talent Profile:

1. Prerequisite - The sections of the Talent Profile are configured by the HR Administrator. The configuration for your organization's implementation determines which sections and fields are displayed and/or editable by the manager or the employee.

2. Open the Talent Profile from the Employee Center's Quick Links section, using the My Profile link.

3. An employee's Talent Profile can be viewed and printed by the employee and managers.
4. When viewed by the employee, much of the information shown in the Talent Profile can be edited by the employee; except for the information shown under the General, Compensation and Review History sections.

5. When viewed by the employee's direct or high-level manager, metric information is also available on the Talent Profile and can be edited as needed.

Figure: Talent Profile page - General and Metrics sections.

**Sections in the Talent Profile**

The following sections, listed here with default name and order, are available to display in the Talent Profile. When a section is configured to be displayed in the Talent Profile, a corresponding link for the section displays in the left side menu.

<table>
<thead>
<tr>
<th>Section Name</th>
<th>Available Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>View, Change Photo, Print</td>
</tr>
<tr>
<td>Metrics</td>
<td>View, Expand/Collapse, Show History, Edit, Save/Cancel, Print.</td>
</tr>
<tr>
<td>Review History</td>
<td>View, Print</td>
</tr>
<tr>
<td>Compensation</td>
<td>View, Print</td>
</tr>
<tr>
<td>Competencies</td>
<td>View, Expand/Collapse, Edit, Add/Delete, Save/Cancel, Print.</td>
</tr>
<tr>
<td>Employee Information</td>
<td>View, Expand/Collapse, Edit, Save/Cancel, Print.</td>
</tr>
<tr>
<td>Education</td>
<td>View, Expand/Collapse, Edit, Add/Delete, Save/Cancel, Print.</td>
</tr>
<tr>
<td>Work Experience</td>
<td>View, Expand/Collapse, Edit, Add/Delete/Move in Order, Save/Cancel, Print.</td>
</tr>
<tr>
<td>Certification</td>
<td>View, Expand/Collapse, Edit, Add/Delete/Move in Order, Save/Cancel, Print.</td>
</tr>
<tr>
<td>Job Preference</td>
<td>View, Expand/Collapse, Edit, Add/Delete/Move in Order, Save/Cancel, Print.</td>
</tr>
</tbody>
</table>
### Printing the Talent Profile

Print the content displayed in the Talent Profile using the Print button located on the Actions toolbar, just above the General section. When printing a talent profile you can select which sections to include, with the exception of the General section which is always included. The sections available to be printed are dependent on your permissions. Print output is dependent upon what you can see in the Talent Profile, and what you have selected in the print dialog when printing is initiated. The selected sections will be printed in the same order as seen in the Talent Profile.

### General Section

The Talent Profile's General section provides a visual header for the Talent Profile. It is a partially configurable section, you can customize six of the fields in the General section. The General section is unique in that it is divided into two subsections by a horizontal, thin gray line.

The region above the line contains elements which are not configurable (i.e. Current Job). The region is generally not editable by the user, with the exception they can upload an employee photo there.

The region below the line contains elements which are configurable (e.g. location, contact and organization information). The region below the line is always 50/50 Split into two columns, this is not a configurable attribute. Up to 6 fields may display below the gray line. None are editable by the user.

The General section is available and visible for all users. Availability and visibility configuration of this section is not provided.

The General section is the one section of the Talent Profile always included when you print a profile.

### Employee Image in the General Section

Beginning with Feature Pack 12C a larger image size is displayed in the General section. It is 256 x 256 pixels, larger than in the Performance Card. The larger image will not display automatically for users migrating from a prior Feature Pack. By default the larger image is shown as a silhouette, as employee photos from prior implementations are in smaller size. Employee photos need to be re-imported in order to have them shown on the General section.

There are several ways to get the larger employee images to display on the General Section:

- Manually update a photo within the user's General section.
- Update a photo through a user's SmartOrg user account.
- Use the Taleo Connect Client (TCC) to batch load employee photos.

### Metrics Section

The Metrics section provides the employee's metrics information. Content displayed includes employee review and goal ratings and supporting employee metrics. The metrics display is for the managers of the employee. The section is editable for some fields.

### Customizable Employee Metrics Use in the Talent Profile

Only activated employee metric values are available in the Talent Profile's selection lists. However, the metric values previously used in employee records are not automatically changed even though certain values may be deactivated in Configuration.
Users can view metrics history in the Talent Profile by clicking the More Actions button at the top of the Metrics section. The actions list provides the following options:

- Nominate for Position
- Show History
- Create Report

When the user selects the Show History option, the Metrics History dialog provides options for the following employee metrics:

- Review Rating
- Potential
- Risk of Loss
- Promotability Readiness
- Reassignment Candidate
- Competency Rating
- Goal Rating
- Impact of Loss

Potential, risk of loss and promotability readiness are customizable.

**Metric History Tracking**

At the top of the Talent Profile page is a toolbar including a Print button and a More Actions menu. An option provided in the print dialog is to select Metric Show History and include it in Talent Profile print output. (Navigation: Performance > Employee Center > My Profile > Header section > Print button.)

The More Actions menu includes a Show History option. Selecting this option opens the Metrics History dialog, where you can set the system to show history for selected employee metrics.

![Figure: Talent Profile page's More Actions menu, with Show History option for a variety of employee metrics.](image)

**Review History Section**

The employee review history data displayed on the talent profile can include the date, manager, overall review rating, goal rating, and competency rating. This section is not editable. Details can come from the last five completed reviews. Values are taken from the historical review table, so active reviews cannot be included. The rating values are based on the corresponding metric rating model and displayed according to the Metric Rating Display setting. For instance, a metric rating model that uses names (Poor, Average, Good) and numeric values (1, 3, 5) coupled with a rating display value *In text and numeric format* would display ratings such as *Average - 3.*
The most recent Review Rating entry in the Review History Section will match the Last Focal Review Rating in the General Section, if it is displayed. Other ratings displayed in the General Section do not align with Review History section ratings.

In the Review History section configuration all the review history-related fields are selected to set them to "Displayed" by default. The administrator has the option of unselecting any or all of them to make them "Not Displayed".

Compensation Section
The Compensation section displays the employee's compensation history data. Content displayed includes current salary, and bonus and stock awards. This section is not editable by the user.

Competency Section
The Competency section is editable. Users can view, add, remove and rate competencies for themselves directly into this section. The section displays competency data for various areas such as Behavioral, Job-Specific and Language. The ability to view and edit competencies in this section is dependent on section configuration and your specific user type permissions. The user type relates to the talent profile that is viewed. The same user will have different user type access to employee competency settings, depending on that user's relationship to the user whose talent profile they wish to view. It is important to note that these competency specific user types do not relate directly to the standard user types as defined in SmartOrg.

For example, when Michael Decker views his own talent profile, he is accessing it as an employee and the competency settings for an employee user type apply. When he views the talent profile of Renee Washington, who is one of his direct reports, he is accessing it as a manager and the competency settings for a manager user type apply. Chris Baker reports directly to Renee Washington, so if Michael Decker was to view his talent profile it would be as a high level manager and the corresponding competency settings are applied.

When adding a new competency in the Talent Profile, the Competency Selector dialog enables you to search for the competency using keywords. Filters are also available to assist in searching the list of competencies, depending upon configuration. If competencies in the section are configured to be grouped by Type, then the available filter options are Group and Category. If competencies are configured by Group, the available filter options are Type and Category.

Employee Information Section
The Employee Information section provides general employee information; such as their current position. The section is editable.

Education Section
The Education section provides employee education information; such as Institution, Program, Educational Level, Start and Graduation Date. The section is highly editable by the employee. They can add, remove and edit records. If LinkedIn Integration is enabled employee's can import LinkedIn profile information to this section.

Work Experience Section
The Work Experience section provides employee job history information; such as employer, job title, start and end date, supervisor information, and tasks and achievements. The section is highly editable by the employee. They can add, remove and edit records. If LinkedIn Integration is enabled employee's can import LinkedIn profile information to this section.

Certification Section
The Certification section provides employee certification information; such as certification, certification number, expiration date, organization, location, etc. The section is highly editable by the employee. They can add, remove and edit records. If LinkedIn Integration is enabled employee's can import LinkedIn profile information to this section.

Job Preference Section
The Job Preference section provides employee job preference information; such as for jobs, work locations and organizations. The section is highly editable by the employee. They can add, remove and edit records.

Attachment Section

The Attachments Section provides a place for employees to attach supporting documents. They can add and remove attachments. The system adds the Attached By person and Date to the display.

To Edit a Talent Profile

Prerequisite

Performance > Employee Center > [Quick Links] My Profile (for you own Talent Profile)

Performance > Employee Center > [Quick Links] Talent Profile > [Breadcrumbs] Employee (if you are a manager change to profile for another employee)

Performance > Employee Center > [Quick Links] Talent Browser > Select an employee (if you are a manager) > Select Talent Profile

Steps

1. In the Talent Profile, use the Menu on the left, or the scroll bar on the right, to go to the section you want to modify and click Edit.
   Depending on your user permissions, some sections may not be editable. The General, Review History and Compensation sections are generally not editable by anyone, with the exception of the employee photo in the General section.

2. Click Edit to update the section details:
   - In the General section, hover your mouse over the employee photo and click the Change Photo popup link to upload a different employee photo.
   - In the Metrics section, click Edit and you can modify standard and custom metric values.
   - In the Competencies section, the Competency Selector enables you to immediately search for a competency using keywords, or you can refine your search by filtering the Type, Group and Category before you enter keywords. The filters refresh the results automatically, while you must select Go to search by keywords. From the Development Activity column you can create and assign activities by clicking .
   - In the Employee Information section, the values are custom user-defined values and can include a number of different types, such as check boxes, drop-down lists and date fields.
   - In the Education, Work Experience and Certification sections, you can add, edit and remove entries. You can also reorder them. If LinkedIn Integration is enabled, you can import LinkedIn profile information into these sections of the Talent Profile.
   - In the Job Preferences section, you can change details such as: your willingness to move, which disciplines you would like to work in, which locations you would work at. Do this using a combination of drop-down lists, free text fields and selectors.

   When selecting and saving the Organization, Location and Job Fields in this section, the parent values in a hierarchy are not displayed in the list when specific leaf values are also selected. When only a parent value is selected and saved, it is displayed in the list. For example, if the three locations Canada, Canada - British Columbia, and United States are selected; only two are displayed, Canada - British Columbia and United States. The parent value Canada is omitted from the list because a leaf of Canada is selected.

   - For the Attachments section, see To attach files.
3. Click Save at the section-level as you complete edits on each section.
4. Repeat steps 2 - 3 as needed for additional section edits.

Result
All changes made to the Talent Profile information will be displayed to the employee and reflected in other integrated Taleo applications, as described by Talent Master Profile.

To Print a Talent Profile

Prerequisite
Taleo Performance > Quick Links My Profile

Steps
1. Click the Print button on the toolbar just above the General section.

2. In the Print Options dialog select the checkbox for each section you want included. The General section is always included. You can also opt to include Metrics History in the print output.
   The dialog displays checkboxes for those sections your configuration displays in the Talent Profile. While the order of the sections in the print dialog may be different than in the user interface, when printed the sections will match what is displayed in Taleo Performance. You cannot select to print only part of a section.
3. Click Print.

Result
A PDF is generated, which can be printed or saved. It includes the selected sections, company logo, employee photo, generation date, and page numbers.

LinkedIn Integration
The Talent Profile can be integrated with LinkedIn, to allow an employee's LinkedIn profile information to be imported to and used in the Work Experience, Education and Certification sections of their Talent Profile.

Importing LinkedIn Data to a User's Talent Profile
The “Import from LinkedIn” option is only available to the owner of the Talent Profile, and only when the Enable LinkedIn Integration and Talent Profile Settings configurations are set up. The option displays as a button available on three Talent Profile sections: Work Experience, Education and Certifications. It displays alongside text stating "Last Import on [Datestamp]".

LinkedIn Information Available for Import
You can selectively import information from LinkedIn fitting the Work Experience, Education and Certification sections of the Talent Profile. The information available for import from LinkedIn is:

- Education: Other Institution Education, Other Program Education, Start date Education, End date Education.
- Certifications: Other Certification, Number/ID Certification, Issue Date Certification, Expiration Date Certification.
To Import LinkedIn Information

Prerequisite

- LinkedIn Integration must be enabled by Support.
- Customer must enter LinkedIn API keys in Talent Profile Properties configuration.
- Employee must have LinkedIn profile information entered in LinkedIn.

Steps

1. If LinkedIn Integration is enabled and configured you will see the Import from LinkedIn button at the header level for the Work Experience, Education and Certification sections.
2. Click the Import from LinkedIn button from within the context of one of the desired sections (e.g. within Work Experience).
3. You are prompted by a legal disclaimer. Click Yes to agree with the disclaimer and proceed. The legal disclaimer is a reminder about the need to close your login session in LinkedIn, even after you have logged out of Oracle Taleo Performance. Otherwise your LinkedIn account remains open for a period of time, leaving it vulnerable to the next user who logs onto the machine. The legal disclaimer and LinkedIn authentication dialog only display once for a login session.
4. When prompted for LinkedIn authentication, enter your LinkedIn login information and click OK.
5. The Add dialog displays all the LinkedIn profile information/records for the section you are working from (e.g. Work Experience).
   For example, if you are working from the Talent Profile's Work Experience section, the dialog is named "Add Work Experience from LinkedIn", and it displays a list of the employers (work experiences) you previously entered into your LinkedIn account.
6. To review the employment information click on each record name to view its detail information.
7. To select a record(s) for import click the checkbox(es) to the left of each one. The Add button is activated when you select a record.
8. Click Add to import the selected information from LinkedIn into the Talent Profile.
LinkedIn information is transferred to your working Talent Profile section (e.g. Work Experience).

9. Save your work when done.

Do not forget to log out of your LinkedIn session. You login authentication to LinkedIn lasts until your LinkedIn session is logged out.

**Talent Profile Fields**

Standard and Employee Metric type fields available for display in Taleo Performance’s Talent Profile are presented in the following table, by alphabetical order of field name. Entries in the table include the name of the field, and a description. Many of the fields are available to be configured into more than one of the Talent Profile sections. The display of sections and fields in the Talent Profile are highly configurable. The fields you actually see are subject to your organization's implementation.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achievements</td>
<td>Free-form text box indicating additional tasks and achievements. Tasks and Achievements in Taleo Performance.</td>
</tr>
<tr>
<td>Anticipated Graduation Date</td>
<td>Flag indicating that the anticipated graduation date is in the future.</td>
</tr>
<tr>
<td>Bench Strength</td>
<td>Metric that represents an enumeration value based on the number of successors in the succession plan for the position. Possible values are: None (no succession plan exists), Poor (no successor has been defined on the existing succession plan for the position), Average (there is 1 successor) and Good (there are 2 or more successors). This value is not editable in the Talent Profile.</td>
</tr>
<tr>
<td>Bonus</td>
<td>Amount and/or percentage of the bonus.</td>
</tr>
<tr>
<td>Bonus Plan</td>
<td>Name of the bonus plan.</td>
</tr>
<tr>
<td>Can we Contact the Supervisor</td>
<td>Flag that indicates whether it is possible to communicate with the supervisor to get further information.</td>
</tr>
<tr>
<td>Certification</td>
<td>Name of the certification. When adding a new certification, it must be selected from the Certification Selector.</td>
</tr>
<tr>
<td>Certifications</td>
<td>Section of the Talent Profile that presents the certifications of the employee.</td>
</tr>
<tr>
<td>Competencies</td>
<td>Sub-section of the Competencies section that lists behavioral competencies.</td>
</tr>
<tr>
<td>Competency Rating</td>
<td>Metric that indicates the competency rating on the last closed review, based on the review section configured to provide the basis for this rating.</td>
</tr>
<tr>
<td>Competency Rating</td>
<td>Review rating score for only the Competency section of the review. It is possible this value could be empty, while there is still an overall score. The value is based on the final goal score, which uses the 'Competency Rating' Metric Rating Model setting to determine the available values. It is formatted based on the Metric Rating Display setting.</td>
</tr>
<tr>
<td>Critical</td>
<td>Metric that indicates whether the position occupied by the employee is critical or not. This value comes from the Job Position’s Criticality field in SmartOrg and is not editable in the Talent Profile. The position is considered critical when the</td>
</tr>
<tr>
<td>Name</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Criticality field</td>
<td>Criticality field value in SmartOrg is 5; all other Criticality field values (1 to 4) represent a non-critical position.</td>
</tr>
<tr>
<td>Current Position</td>
<td>Current position of the employee, as defined in the employee's user account in SmartOrg.</td>
</tr>
<tr>
<td>Current Review Status</td>
<td>The status of the employee's current review, such as draft or complete.</td>
</tr>
<tr>
<td>Current Salary</td>
<td>Annual salary of the employee.</td>
</tr>
<tr>
<td>Custom Metrics</td>
<td>Section of the Talent Profile that shows any user-defined metric field.</td>
</tr>
<tr>
<td>Development Activities</td>
<td>Activities the employee engages in to develop their job skills.</td>
</tr>
<tr>
<td>Development Overall Progress</td>
<td>The overall progress of the employee's development plan, indicated as a percentage.</td>
</tr>
<tr>
<td>Education</td>
<td>Section of the Talent Profile that presents education information about the employee.</td>
</tr>
<tr>
<td>Education Level</td>
<td>Level of education attained, selected from a list of defined levels.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>Date on which the new salary starts.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>Date on which the bonus is being paid.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>The date on which the review was closed and the score added to the historical review table.</td>
</tr>
<tr>
<td>Email</td>
<td>Email address of the employee at his current position.</td>
</tr>
<tr>
<td>Employee Information</td>
<td>Section of the Talent Profile that presents custom employee information.</td>
</tr>
<tr>
<td>Employee Status</td>
<td>Employee status preferred by the employee.</td>
</tr>
<tr>
<td>Employee's Rating</td>
<td>Rating given by the employee for the competency in the last focal review, that displays in the Talent Profile when the review is closed and the Update Talent Profile option is selected. The text value however is derived from the rating model associated to the specific behavioral competency. The display of this dimension in the Competencies section of the Talent Profile is based on a setting defined in the administration application. The rating can be edited if so configured in the administration application.</td>
</tr>
<tr>
<td>Employer</td>
<td>Name of the employer. When adding a new work experience, the employer must be selected from the Employer Selector.</td>
</tr>
<tr>
<td>End Date</td>
<td>End date for the job function.</td>
</tr>
<tr>
<td>Experience</td>
<td>Number of years of experience in the particular competency, which can only be defined and edited by the employee. The display of this dimension in the Competencies section of the Talent Profile is based on a setting defined in the administration application. The rating can be edited if so configured in the administration application.</td>
</tr>
<tr>
<td>Name</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Expiration Date</td>
<td>Date the certification expires.</td>
</tr>
<tr>
<td>Ext.</td>
<td>Phone extension of the employee at his/her current position.</td>
</tr>
<tr>
<td>Gap Analysis Score</td>
<td>The difference between the recommended rating for each competency in a job role and the rating the employee has for each competency.</td>
</tr>
<tr>
<td>General</td>
<td>Section of the Talent Profile that presents general information about the employee.</td>
</tr>
<tr>
<td>Goal Rating</td>
<td>Metric that indicates the goal rating on the last closed review, based on the review section configured to provide the basis for this rating.</td>
</tr>
<tr>
<td>Goal Rating</td>
<td>Review rating score for only the Goal section of the review. It is possible this value could be empty, while there is still an overall score. The value is based on the final goal score, which uses the 'Goal Rating' Metric Rating Model setting to determine the available values. It is formatted based on the Metric Rating Display setting.</td>
</tr>
<tr>
<td>GPA</td>
<td>Field that indicates the Grade Point Average, that is the mathematical calculation of where an average of the grades falls on a defined scale. For example, the value could be 3.44 out of 5.</td>
</tr>
<tr>
<td>Graduation Date</td>
<td>Date the education was completed and the employee graduated.</td>
</tr>
<tr>
<td>Grant Date</td>
<td>Date on which the stocks will be vested.</td>
</tr>
<tr>
<td>Grant Type</td>
<td>Type of stock.</td>
</tr>
<tr>
<td>Has Development Plan</td>
<td>Metric that indicates whether the employee has a development plan or not.</td>
</tr>
<tr>
<td>Impact of Loss</td>
<td>Metric that indicates how important the employee is in their job function.</td>
</tr>
<tr>
<td>Increase</td>
<td>Amount and/or percentage of the salary increase.</td>
</tr>
<tr>
<td>Increase Type</td>
<td>Type of salary increase.</td>
</tr>
<tr>
<td>Institution</td>
<td>Name of the educational institution. When adding a new education, the institution must be selected from the Institution Selector.</td>
</tr>
<tr>
<td>Interest</td>
<td>Level of interest in the particular competency, which can only be defined and edited by the employee. The display of this dimension in the Competencies section of the Talent Profile is based on a setting defined in the administration application. The rating can be edited if so configured in the administration application.</td>
</tr>
<tr>
<td>Interest in International Assignment</td>
<td>Willingness to work abroad.</td>
</tr>
<tr>
<td>Interim Replacement</td>
<td>Metric that indicates if an interim replacement has been set for the position occupied by the employee. The interim replacement value comes from the succession plan of the employee and is not editable in the Talent Profile.</td>
</tr>
<tr>
<td>Issue Date</td>
<td>Date the certification was issued.</td>
</tr>
<tr>
<td>Job Fields</td>
<td>Job fields of interest, including category, function and specialty.</td>
</tr>
<tr>
<td>Job Function</td>
<td>Name of the job function. When adding a new work experience, the job function must be selected from the Job Field Selector.</td>
</tr>
<tr>
<td>Name</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Job Level</td>
<td>Job level preferred by the employee.</td>
</tr>
<tr>
<td>Job Preferences</td>
<td>Section of the Talent Profile that presents the employee's work preferences. These preferences are defined by the employee and can later be used by managers to find successors according to preferences via the Advanced Search options.</td>
</tr>
<tr>
<td>Job Type</td>
<td>Job type preferred by the employee.</td>
</tr>
<tr>
<td>Languages</td>
<td>Sub-section of the Competencies section that lists language competencies.</td>
</tr>
<tr>
<td>Last Review Rating</td>
<td>Overall rating of the employee's last completed performance review.</td>
</tr>
<tr>
<td>Last Update</td>
<td>The date when the employee last made a change to their goal plan.</td>
</tr>
<tr>
<td>Last Used</td>
<td>Indication of the last time the particular competency was used, which can only be defined and edited by the employee. The display of this dimension in the Competencies section of the Talent Profile is based on a setting defined in the administration application. The rating can be edited if so configured in the administration application.</td>
</tr>
<tr>
<td>Location</td>
<td>Location of the work place of the employee, as defined in the employee's user account in SmartOrg.</td>
</tr>
<tr>
<td>Locations</td>
<td>Locations of interest, including country, state/province, region and city.</td>
</tr>
<tr>
<td>Manager</td>
<td>Name of the employee's direct manager, as defined in the employee's user account in SmartOrg.</td>
</tr>
<tr>
<td>Manager</td>
<td>The name of the manager who owns the review.</td>
</tr>
<tr>
<td>Manager's Rating</td>
<td>Rating given by the manager for the competency in the last focal review, that displays in the Talent Profile when the review is closed and the Update Talent Profile options is selected. The text value however is derived from the rating model associated to the specific behavioral competency. The display of this dimension in the Competencies section of the Talent Profile is based on a setting defined in the administration application. The rating can be edited if so configured in the administration application.</td>
</tr>
<tr>
<td>May we contact the supervisor?</td>
<td>Flag that indicates whether it is possible to communicate with the supervisor to get further information.</td>
</tr>
<tr>
<td>Metrics</td>
<td>Section of the Talent Profile that presents employee metrics. This section is only seen by managers for their direct reports.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the competency that can be added by the employee or drawn from the employee's last focal review when the Update Talent Profile option is selected.</td>
</tr>
<tr>
<td>New Salary</td>
<td>Amount of the new salary, that is the current salary plus the increase.</td>
</tr>
<tr>
<td>Number of Activities</td>
<td>The number of development activities in the employee's development plan.</td>
</tr>
<tr>
<td>Number of Career Scenarios</td>
<td>Number of career scenarios the employee has in their career plan.</td>
</tr>
<tr>
<td>Number of Succession Plans</td>
<td>This metric indicates the number of succession plan this person is part of.</td>
</tr>
<tr>
<td>Number of Successors</td>
<td>Number of successors included in the succession plan for the employee.</td>
</tr>
<tr>
<td>Number/ID</td>
<td>Course number or ID associated with the certification.</td>
</tr>
<tr>
<td>Name</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Organization</td>
<td>Name of the organization responsible for providing the certification.</td>
</tr>
<tr>
<td>Organization</td>
<td>Organization where the employee works, as defined in the employee's user account in SmartOrg.</td>
</tr>
<tr>
<td>Organizations</td>
<td>Organizations of interest, including company, section, department and division.</td>
</tr>
<tr>
<td>Other Certification</td>
<td>Field used to specify a certification that is not in the list provided in the Certification Selector.</td>
</tr>
<tr>
<td>Other Employer</td>
<td>Field used to specify an employer that is not in the list provided in the Employer Selector.</td>
</tr>
<tr>
<td>Other Institution</td>
<td>Field used to specify an education institution that is not in the list provided in the Institution Selector.</td>
</tr>
<tr>
<td>Other Job Function</td>
<td>Field used to specify a job function that is not in the list provided in the Job Field Selector.</td>
</tr>
<tr>
<td>Other Program</td>
<td>Field used to specify an education program that is not in the list provided in the Program Selector.</td>
</tr>
<tr>
<td>Overall Progress</td>
<td>The overall completion percentage for each of the goals in the employee's goal plan.</td>
</tr>
<tr>
<td>Phone</td>
<td>Phone number of the employee at their current position.</td>
</tr>
<tr>
<td>Potential</td>
<td>Metric that indicates the potential of an employee, that is editable by the manager and not visible to the employee.</td>
</tr>
<tr>
<td>Preferred Job</td>
<td>Preferred job fields of the employee, selected from those available within the organization. Includes category, function and specialty.</td>
</tr>
<tr>
<td>Preferred Location</td>
<td>Preferred locations of the employee, including country, state/province, region and city.</td>
</tr>
<tr>
<td>Preferred Organization</td>
<td>Preferred organizations of the employee, including company, section, department and division.</td>
</tr>
<tr>
<td>Proficiency</td>
<td>Level of expertise an employee has in regards to a particular competency. The display of this dimension in the Competencies section of the Talent Profile is based on a setting defined in the administration application. The rating can be edited if so configured in the administration application.</td>
</tr>
<tr>
<td>Program</td>
<td>Name of the education program. When adding a new education, the program must be selected from the Program Selector.</td>
</tr>
<tr>
<td>Promotability Readiness</td>
<td>Metric that indicates how much time is required for the employee to be ready for a promotion, that is editable by the manager and not visible to the employee.</td>
</tr>
<tr>
<td>Reassignment Candidate</td>
<td>Metric that indicates if the employee is available for reassignment, that is editable by the manager and not visible to the employee.</td>
</tr>
<tr>
<td>Replacement Name</td>
<td>When there is an interim replacement for the employee, this metric shows the name of the replacement.</td>
</tr>
<tr>
<td>Review Rating</td>
<td>Metric that indicates the review rating the employee received on the last closed performance review.</td>
</tr>
<tr>
<td>Name</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Review Rating</td>
<td>Overall review rating score given by the manager for the review. The value is based on the final score of the review, which uses the 'Review Rating' Metric Rating Model setting to determine the available values. It is formatted based on the Metric Rating Display setting.</td>
</tr>
<tr>
<td>Review Status</td>
<td></td>
</tr>
<tr>
<td>Risk of Loss</td>
<td>Metric that indicates the probable risk level of losing the employee, that is editable by the manager and not visible to the employee.</td>
</tr>
<tr>
<td>Schedule</td>
<td>Work schedule preferred by the employee.</td>
</tr>
<tr>
<td>Show</td>
<td>Field that provides the ability to select the competency information type to be displayed. You can choose to display General information (such as Proficiency, Experience, Last Used, Interest) or Rating information (that being the Manager and/or the Employee's Rating).</td>
</tr>
<tr>
<td>Skills</td>
<td>Sub-section of the Competencies section that lists technical competencies.</td>
</tr>
<tr>
<td>Start Date</td>
<td>Date the education started.</td>
</tr>
<tr>
<td>Start Date</td>
<td>Date the job function started.</td>
</tr>
<tr>
<td>Status</td>
<td>Overall status of the employee's current goals.</td>
</tr>
<tr>
<td>Still in Position</td>
<td>Flag that indicates that the employee in still working in the related position. Most commonly, this flag is used when the end date is not specified.</td>
</tr>
<tr>
<td>Stock Grant</td>
<td>Number of stocks.</td>
</tr>
<tr>
<td>Supervisor's Email</td>
<td>Email of the supervisor for the related job function.</td>
</tr>
<tr>
<td>Supervisor's Name</td>
<td>Name of the supervisor for the related job function.</td>
</tr>
<tr>
<td>Supervisor's Phone</td>
<td>Phone number of the supervisor for the related job function.</td>
</tr>
<tr>
<td>Supervisor's Title</td>
<td>Title of the supervisor for the related job function.</td>
</tr>
<tr>
<td>Target Bonus</td>
<td>Amount and/or percentage of the bonus that was targeted.</td>
</tr>
<tr>
<td>Tasks and Achievements</td>
<td>Free-form text box indicating any other task and achievement.</td>
</tr>
<tr>
<td>Total Not-vested Stock</td>
<td>Total number of stocks that are not yet vested.</td>
</tr>
<tr>
<td>Willing to Relocate</td>
<td>Employee's willingness to move to a different location.</td>
</tr>
<tr>
<td>Willing to Travel</td>
<td>Percentage of time an employee is willing to travel for their job.</td>
</tr>
<tr>
<td>Work Experience</td>
<td>Section of the Talent Profile that presents information about the work experience of the employee.</td>
</tr>
<tr>
<td>Work Experience</td>
<td>Section of the Talent Profile that presents the employee's work experience.</td>
</tr>
<tr>
<td>Work Phone Number</td>
<td>Phone number of the employee at their current position.</td>
</tr>
<tr>
<td>Work Phone Number and Extension</td>
<td>Phone number and extension of the employee at their current position, in a single field.</td>
</tr>
<tr>
<td>Work Experience</td>
<td>Section of the Talent Profile that presents the employee's work experience.</td>
</tr>
</tbody>
</table>
### Deleting Rated Competencies

Typically employees or managers cannot delete a competency from the Talent Profile once it has been rated, but HR Administrators are able to do so. The correct user type permissions are required and certain administration settings must be enabled.

### To Delete Rated Competencies from the Talent Profile

**Prerequisite**

User must be an HR Admin with view/manage access to talent profiles.

User must have the Talent Profile Competency Configuration settings, **Remove Competencies** and **Display competency section in Talent Profile** enabled.

**Steps**

1. Access the Talent Profile of the employee.
2. Select **Competencies** from the menu.
3. Select the name of the competency to delete and click **Delete**.

If a message is displayed, click **OK** to confirm deletion.

**Result**

The competency is deleted from the talent profile and is also deleted from any development activities it is associated with.

### Showing Compensation Data in Taleo Performance

Compensation history data can be configured to display within Taleo Performance.

The talent model includes compensation data elements so that compensation data may be displayed within the Taleo Performance application. This compensation data can come from Taleo Compensation or from an external HRMS/ERP system.

The compensation history data is displayed according to metric configuration, availability, and user security access in the following areas:

- **Talent Profile** - Displays compensation history data.
- **Performance Snapshot Card** - Displays compensation data in the Compensation section of the snapshot card.
- **Talent Browser** - Displays salary, bonus, and stock information for employees.
When compensation history data is available, and the related metric has been configured to display, the following information is provided in Taleo Performance, when available:

- Employee's current salary
- Employee's salary increase, new salary and effective date
- Employee's bonus amount, bonus plan, target bonus amount and effective date
- Employee's stock grant amount, total non-vested stock and grant date

Compensation history is available from Taleo Compensation through an integration. If Taleo Compensation is activated in the zone and the integration is configured, the system will automatically transfer all compensation history data into SmartOrg on a daily basis. If Taleo Compensation is not activated, the client can use the standard integration tools to transfer the data from an outside ERP system.

**Talent Master Profile**

Using a single core person model to support Candidate and Employee Data, the Taleo application allows the transformation of candidates to employees. This is supported in concert with an organization's HRMS/ERP system, which will play an intermediary role in this process to allow the assignment of an Employee ID.

By using a single person model for all records, any updates by an organization's HRMS system are visible both in the candidate's file seen in Taleo Recruiting and from Taleo Performance. All data is shared from the same data source. This also means that if an employee updates his/her record from the Talent Profile in Taleo Performance by adding certifications or additional educational information, this information is also updated on that person's candidate record visible in Taleo Recruiting. The reverse is also true, if an employee updates his/her profile by applying to a newly opened internal position on a career site. These additions also serve to augment this candidate's employee profile.

**Employee Photo Upload**

Instead of having to use the Configuration module or Taleo Connect Client for uploading photos, employees can upload a photo for themselves.

**Larger Photo Image in the Talent Profile**

A large size employee photo image (256 x 256 pixels) can be displayed in the Talent Profile's General section. The larger photo image is also used in the header section of Native Reports. For more information see Native Reporting. Elsewhere in the system, such as on the Talent Card, the photo is resized to a smaller image (48 x 48 pixels).

At migration the system will not automatically display photos from implementations prior to Feature Pack 12C. By default the larger photo will be shown as a silhouette, as photos from earlier implementations are smaller in size. In this case employee photos will need to be re-imported in order to have them display on the General section.

There are several ways to get the larger employee photo images to display on the General section:

- Manually update a photo within the user's General section.
- Update a photo through the user's SmartOrg account.
- Use the Taleo Connect Client (TCC) to batch load employee photos.

**Employee Upload of Photo Image**

From the Talent Profile General section, an option is available to browse to a photo in your local network and upload it to Taleo Performance. You can upload .gif, .jpg, and .png files. In instances where a photo isn't a
passport style photo, and you upload a portrait orientated photo, the system will attempt to crop the top part of the photo and display it, while with a landscape photo it will crop the center of the photo and display it.

**To Upload an Employee Photo**

**Prerequisite**

You must have user type permissions for editing talent profiles, and talent profile configuration settings for uploading photos must be enabled.

**Steps**

1. Access the talent profile for the employee whose photo you want to change.
2. Hover your mouse over the photo and click the *Change Photo* popup.
   
   If you have accessibility features enabled, you will click the *Change Photo...* button beside the photo.
3. Browse to the photo you want to upload, select it and click *Open*.
   
   Supported file types are .gif, .jpg, and .png.

**Result**

The photo is resized to 256 x 256 pixels by the system and displayed in the *General* section of the talent profile. Elsewhere in the system where employee photos are displayed, such as in the Talent Card, they are resized to a smaller image size, 48 x 48 pixels.

**Next Step**

If you do not like the results of the employee photo upload, you should resize the image on a local machine to have equal width and length, and then re-upload it. You can also delete the photo, replacing it with a generic silhouette.

**Talent Snapshot**

This provides the ability to view key employee information from different modules in the same place.

It is accessible via the icon throughout the system. This includes areas such as the Talent Browser, Network panel, Search results, Talent Pools, Succession Plans, and Performance Review list.

Employee management configuration settings for metrics, along with user type permissions, control access to Snapshot information.

The following metrics are displayed in the Talent Snapshot, all four of which are customizable:

- Potential
- Risk of Loss
- Impact of Loss
- Promotability Readiness

Selecting View Org Chart will display the person as the top node in the Talent Browser.

For information on the details for each module, see the corresponding sections in the Help Center or Taleo Performance user guide.

The Talent Snapshot summary provides information on the following:
<table>
<thead>
<tr>
<th>Section</th>
<th>Included Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Information</td>
<td>Manager, Current Position, Direct Reports, Work Experience, Education. When available, the first five direct reports, first work experience entry, and first education entry are displayed automatically.</td>
</tr>
<tr>
<td>Goal Plan</td>
<td>Overall goal plan (total goals, goals aligned to manager, overdue goals, overall progress, approval status, last updated date), Employee goals (name, alignment, progress, due date).</td>
</tr>
<tr>
<td>Development Plan</td>
<td>Overall dev plan (total activities, overdue and completed activities, approval status, last updated date), development activities (name, progress, due date).</td>
</tr>
<tr>
<td>Succession Plan</td>
<td>Overall succession plan (total number of successors, total number of nominations, bench strength, successors list, approved, last updated date). This section also includes Employee metrics (Potential, Risk of Loss, Promotability Readiness), Position metrics (Critical Position), and Succession metrics (Interim Replacement, Number of Succession Plans the user belongs to). The metrics can be displayed even if no succession plan is available.</td>
</tr>
<tr>
<td>Career Plan</td>
<td>Overall career plan (current job, scenario steps, gap analysis for each step indicating competencies required for the job). You can switch between scenarios and each one can display the current job and the first two steps of the plan.</td>
</tr>
</tbody>
</table>

**Performance Snapshot Card**

The Performance snapshot card contains data on the employee's current salary and compa-ratio, along with data on the last three closed focal performance reviews and compensation periods. The data that is displayed is impacted by your user type permissions and whether you have compensation data.

At a minimum, the Performance Review Ratings display one value per review period for the Overall score of the review. It may also contain Goal section and Competency section scores depending on your review configuration. The most recent review values displayed are the same as those found in the Metrics section of the Talent Profile. For more details on how ratings scores are derived and displayed, see the *Taleo Performance Review Ratings Orientation Guide*.

Compensation data can be brought into Taleo Performance via an integration with Taleo Compensation or by importing data from a third-party system using Taleo Connect Client (TCC). Regardless of which, batch data import jobs should be scheduled regularly to ensure the most up to date compensation data is displayed. For integration details, see the *Taleo Compensation and Performance Integration Guide*.

While the compensation data values available to both the snapshot and talent profile are the same, they are displayed differently. The talent profile only displays information when it is available and only displays the most recent individual values. The snapshot card displays NA when there is no information and displays values based on yearly totals and availability.

Performance and compensation data are independent of each other, therefore it is possible the periods displayed for each will differ.
### Performance Card Contents

<table>
<thead>
<tr>
<th>Subject</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Salary</td>
<td>This value is taken from the compensation history table. Depending on when the compensation data was last updated, it is possible this is not your actual current salary.</td>
</tr>
<tr>
<td>Compa-ratio</td>
<td>This value is taken from the compensation history table. Depending on when the compensation data was last updated, it is possible this is not your actual current compa-ratio.</td>
</tr>
</tbody>
</table>

### Performance Review Ratings

<table>
<thead>
<tr>
<th>Overall</th>
<th>Displays the Overall review rating based on the Employee - Review Rating value kept in the historical review table for the indicated review period. All scores are for completed and closed review periods. No active scores are included.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goals</td>
<td>Displays the rating for the Goals section of the review. This is based on the Employee - Goal Rating value kept in the historical review table for the indicated review period. All scores are for completed and closed review periods. No active scores are included.</td>
</tr>
<tr>
<td>Competencies</td>
<td>Displays the rating for the Competencies section of the review. This is based on the Employee - Competency Rating value kept in the historical review table for the indicated review period. All scores are for completed and closed review periods. No active scores are included.</td>
</tr>
<tr>
<td>Review Comments</td>
<td>When you select an overall rating, review comments associated with it are displayed here. If no comments exist, the score is not a clickable link.</td>
</tr>
</tbody>
</table>

### Compensation History

<table>
<thead>
<tr>
<th>Salary Increase</th>
<th>These values come from the compensation salary history table associated with the effective date displayed on the card. The Taleo Enterprise SmartOrg Data Dictionary provides details on compensation elements.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bonus Award</td>
<td>These values come from the compensation bonus history table associated with the effective date displayed on the card. As currencies are displayed for both this value and Salary Increase and multiple currencies are not supported within the same aggregated period, you should use the same currency whenever possible.</td>
</tr>
<tr>
<td>Stock Granted</td>
<td>These values come from the compensation stock history table associated with the effective date displayed on the card.</td>
</tr>
</tbody>
</table>

### To view an Employee's Snapshot

**Prerequisite**

You must have user type permissions for the specific modules to see the information associated with them. If you do not have the permissions, the sections are not displayed.

**Steps**

- Click [here](#).

**Result**

The Employee Information section is displayed. Click [here](#) to change sections. Click View Org Chart to see the employee displayed as the top node in the Talent Browser. Click [here](#) to display the Go To menu.
Attachments

Files can be attached to Performance Reviews, Goal Plans, and the Talent Profile. This enables employees to include documents that are not kept in Taleo Performance, in support of their achievements and progress for reviews and plans, such as projects plans, implementation scorecards, or client feedback.

The files are associated with the highest level object, such as the overall goal plan itself and not a specific employee goal. Attachments can be viewed by anyone who has view access to the object (goal plan, review, talent profile), while manage access is required to attach files. Only employees can attach files to their goal plans and performance reviews. Like other events, adding and removing attachments is included in the object's history.

As a basic service you can attach up to ten files to an object, with a maximum file size of 1mb, depending on system configuration. If you have already reached your maximum number of attachments you will need to delete a file before a new one can be uploaded. Once a file has been attached it can be updated, but you must save the file locally, make your changes, and then re-upload it. A wide range of file types are supported, but those available to you will depend on your organization's implementation.

If the file restrictions change over time, it is possible some existing attachments will be for file types and file sizes that are no longer allowed.

<table>
<thead>
<tr>
<th>Supported File Types</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type (Extension)</strong></td>
</tr>
<tr>
<td>Word (.doc, .docx)</td>
</tr>
<tr>
<td>HTML page (.htm)</td>
</tr>
<tr>
<td>HTML page (.html)</td>
</tr>
<tr>
<td>Portable Document Format (.pdf)</td>
</tr>
<tr>
<td>Rich Text Format (.rtf)</td>
</tr>
</tbody>
</table>

To Attach Files to the Talent Profile

**Prerequisite**
You must be the owner of the object to which you are attaching files.

**Steps**
1. Select **Quick Links > My Profile**.
2. Scroll to the **Attachments** section and click **Add**.
3. Click **Browse**, select the file you want to upload and then click **OK**.
   The dialog lists the allowed file types and you can only select from them. You should enter a comment to help identify the purpose of the file, especially if it is not clear from the filename.

**Result**
The file is added to the **Attachments** section and includes the filename, comments, who it was attached by, and the date it was attached.
To Attach Files to Goal Plans and Reviews

Prerequisite
Only employees can attach files to their plans and reviews. Managers cannot attach files.

Steps
1. Go to the Goal Plan or Performance Review and click to expand supporting tools.
2. Select the Attachments ribbon and click Add.
3. Click Browse, select the file you want to upload and then click OK.
   The dialog lists the allowed file types and you can only select from them. You should enter a comment to help identify the purpose of the file, especially if it is not clear from the filename.

Result
The file is added to the Attachments section and includes the filename, comments (which you can mouse over to display them in their entirety), who it was attached by, and the date it was attached. The file is attached at the goal plan level — not individual goals — and at the review level — not individual review items.

Next Step
You can view the file by clicking the filename and delete it by clicking and selecting Delete.
Talent Browser

The talent browser provides managers and executives with a flexible, real-time view into their organization.

Some of the talent browser's functionality includes:

- viewing multiple levels with panning, zooming and a mini-organization chart map, for easy navigation
- using the scope options, for viewing multiple levels or just direct reports
- drilling down into the org chart layers, for focusing on specific business units and groups
- filtering by general information, customizable employee metrics, and goal association, for highlighting employees that meet specific criteria
- accessing an employee's snapshot, to have instant access to their key data
- organizational summary card, providing a roll-up view into the metrics for an entire business unit

Customizable Metrics Use in the Talent Browser

The following metrics are displayed in the Talent Browser when Metrics is selected from the General selector, all three of which are customizable:

- Potential
- Promotability Readiness
- Risk of Loss

Using the Talent Browser

You can use the talent browser features to focus in on specific employees or parts of your organization.

- Filtering the Talent Browser - in a large organization, where you have many direct and indirect reports, it can be unrealistic to quickly identify key employees and some degree of filtering should be applied.
- Setting the Scope - enables you to limit the displayed employees to direct reports or an additional level.
- Navigating the Talent Browser - with filter criteria applied you then have multiple options available for viewing and moving around the talent browser.
- Viewing employee information - employee and business unit information is accessible from the talent browser.
- Working with Requisitions and Positions - you can view and access your open requisitions and vacant positions directly from the talent browser.
- Actions from the Employee Card - you can use the Go to menu on an employee card to initiate and complete tasks.

Filtering the Talent Browser

Filters are important for focusing your view when you have oversight into a large workforce.

Managers can use filters to build talent-related queries and see the results in the talent browser. Those cards that match the filter criteria will be highlighted. Filters are logically grouped into sections and each section can be expanded or collapsed.

Filter queries apply AND logic, not OR. For instance, if a manager chooses Potential = High and Risk of Loss = High, it will highlight those employee cards that match both criteria. If someone is Medium Potential with High Risk of Loss, their card is not highlighted.
To Filter the Talent Browser

Prerequisite

*Performance > [Quick Links] Talent Browser*

Steps

1. Select beside a filter section to expand it.
2. Set the filters as required.
3. Click and the employees that match the filters are highlighted in the talent browser.
   
   To reset the filters, click.

Result

Matching employee cards are shaded. For matching cards that are not in the current view, you can see which are shaded via the mini-organization chart.

Talent Browser Filters List

In addition to the standard filters, the Employee Custom Metrics section will display any configured custom metrics.

<table>
<thead>
<tr>
<th>Filter</th>
<th>Description</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Cycle</td>
<td>This includes a set list of review cycles.</td>
<td>Performance Reviews</td>
</tr>
<tr>
<td>Review Request</td>
<td>The review request is dependent on the review cycle.</td>
<td>Performance Reviews</td>
</tr>
<tr>
<td>Manager</td>
<td>The direct manager of the employee. If <em>Include All Reports</em> is selected then all indirect reports are also included.</td>
<td>Employees</td>
</tr>
<tr>
<td>Organization</td>
<td>The business unit the employee is associated with, as indicated by the Organization field in the Talent Profile.</td>
<td>Employees</td>
</tr>
<tr>
<td>Location</td>
<td>Where the employee works, as indicated by the Location field in the Talent Profile.</td>
<td>Employees</td>
</tr>
<tr>
<td>Job Field</td>
<td>Relates to the Job Preferences &gt; Job Fields section in the Talent Profile.</td>
<td>Employees</td>
</tr>
<tr>
<td>Job Level</td>
<td>This value is associated with the employee's job role.</td>
<td>Employees</td>
</tr>
<tr>
<td>Willing to Travel</td>
<td>This filter checks if the employee has indicated they are willing to travel in the Job Preferences section in the Talent Profile. The filter only checks if the value is a zero or greater, so an employee willing to travel 5% of the time is highlighted to the same degree as an employee willing to travel 25% of the time.</td>
<td>Employees</td>
</tr>
<tr>
<td>Willing to Relocate</td>
<td>This relates to the Job Preferences setting of the same name.</td>
<td>Employees</td>
</tr>
<tr>
<td>Interest in International Assignment</td>
<td>This relates to the Job Preferences setting of the same name.</td>
<td>Employees</td>
</tr>
<tr>
<td>Competencies</td>
<td>Any one competency in the system can be selected as filter criteria.</td>
<td>Employees</td>
</tr>
<tr>
<td>Filter</td>
<td>Description</td>
<td>Section</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------</td>
</tr>
<tr>
<td>Critical Position</td>
<td>This checks whether the employee's position has been marked as critical.</td>
<td>Employee Metrics</td>
</tr>
<tr>
<td>Risk of Loss</td>
<td>This checks whether the employee has been identified as potentially wanting to leave the company and the filter can be set for medium or high risk of loss.</td>
<td>Employee Metrics</td>
</tr>
<tr>
<td>Potential</td>
<td>This checks whether the employee has been identified as having potential and the filter can be set for medium or high potential employees.</td>
<td>Employee Metrics</td>
</tr>
<tr>
<td>Readiness for Promotion</td>
<td>Readiness for promotion is indicated by a range months and the filter enables you to select a specific number of months.</td>
<td>Employee Metrics</td>
</tr>
<tr>
<td>Review Rating</td>
<td>This relates to the Metrics &gt; Employee &gt; Review Rating value in the Talent Profile.</td>
<td>Employee Metrics</td>
</tr>
<tr>
<td>Goal Rating</td>
<td>This indicates the completeness of the employees current goal plan. This relates to the Metrics &gt; Employee &gt; Goal Rating value in the Talent Profile.</td>
<td>Employee Metrics</td>
</tr>
<tr>
<td>Competency Rating</td>
<td>This relates to the Metrics &gt; Employee &gt; Competency Rating value in the Talent Profile.</td>
<td>Employee Metrics</td>
</tr>
<tr>
<td>Years in Management</td>
<td>Number of years of management experience.</td>
<td>Employee Metrics</td>
</tr>
<tr>
<td>Years in Industry</td>
<td>Number of years in the same industry as the current position.</td>
<td>Employee Metrics</td>
</tr>
<tr>
<td>Goal Overall Progress</td>
<td>Slider is used to select the progress percentages you want to search between. This searches for active goal plans for the current business period. This relates to the Metrics &gt; Goal &gt; Overall Progress value in the Talent Profile.</td>
<td>Employee Metrics</td>
</tr>
<tr>
<td>Development Overall Progress</td>
<td>Slider is used to select the progress percentages you want to search between.</td>
<td>Development</td>
</tr>
<tr>
<td>Has development plan</td>
<td>Checks if the employee has a development plan. This does not need to be selected to use the Overall Progress filter.</td>
<td>Development</td>
</tr>
<tr>
<td>Business Period</td>
<td>The time frame in which a goal should be completed. This option limits the employee goals available to those associated with the business period and must be selected to enable the employee goals filter. On it’ own this cannot be used as a filter.</td>
<td>Goals</td>
</tr>
<tr>
<td>Employee Goals</td>
<td>The goals available are those of the logged in user. Changing the employee at the top of the tree does not impact which goals are available. Filtering on employee goals highlights employees who have this goal or are aligned to it.</td>
<td>Goals</td>
</tr>
</tbody>
</table>

**Setting the Scope**

Scope determines the level at which the talent browser is viewed and you can choose between displaying direct reports, direct reports plus an additional level, or the entire organization.

When viewing direct reports, you see your own employee card at the top with all direct reports below it. If you choose to view all reports, the entire organization is displayed in the talent browser. Initially the scope is applied to the logged in user, but if you drill down, the scope is applied to that employee.
For example if scope is set to direct reports, in your initial view you see yourself at the top, along with only your direct reports. If you select one of your direct reports, that direct report becomes the top level of the talent browser and only their direct reports are displayed below them.

⚠ Scope must be set at Direct Reports for delegated employees to be displayed and to use the Show Openings option.

To Set the Scope of the Talent Browser

Prerequisite
Performance > [Quick Links] Talent Browser

Steps
From the middle toolbar option, select whether to view All Reports, Direct Reports, or Directs Reports + One Level for the currently selected user.

Result
The talent browser is updated to display the appropriate level and card details information.

Navigating the Talent Browser

The talent browser provides multiple ways to navigate to the employees you want to view:

• zoom and unzoom by using available GUI options or your mouse wheel
• drag and panning around the talent browser using a mouse
• the mini-organization chart, which can be used for panning or for orientating yourself in a large organization
• refocus button to return you to the default view, based on the scope and filter criteria
• Management Bar provides breadcrumbs to show where the person who is currently the top node in the Talent Browser sits within the organization. The breadcrumbs can be used to change who you are viewing as the top node, by moving either vertically (your superiors) or horizontally (your immediate superior's direct reports and your colleagues). While you can view anyone in your organization via the breadcrumbs you can only see details beyond their manager, current position, and direct reports, if you have the required user permissions.

The talent browser can display a maximum of 200 employees and will render complete levels until it hits the threshold of 200. It will not display part of a level. For example, if half-way through the fourth level 200 employees is reached, the org chart will display three levels and those with reports underneath them will have a number on the bottom of their card indicating the remaining employees. The minimum value is 50 and the system default is 100 employees.

To Navigate the Talent Browser

Prerequisite
Taleo Performance > [Quick Links] Talent Browser

Steps
1. To change the zoom level, click + or −, use the mouse wheel, or click the appropriate gray icon to go directly to that level of the org chart.
   The current level is indicated by the blue icon.
2. To drag the org chart, click and hold the mouse button, which displays ⬇️.
If you want to reset the talent browser, click ![refresh_icon] and it returns to the top level.

3. To view superiors and their direct reports, you can click their name in the Management Bar breadcrumbs. If you select one of the employees, they assume the top level in the Talent Browser.

4. To use the mini-organization chart map, click ![chart_map_icon] and click and hold the mouse button to drag the org chart.

   The ![cursor_icon] cursor indicates you are within the map and you can click ![close_icon] to close the map view. Hovering over the bottom right corner displays the resize icon ![resize_icon], you can subsequently click the mouse and use it to change the zoom level.

5. When available, click the number at the bottom of an employee's card to make that person the top of the org chart and to display their direct reports and subsequently click ![up_icon] to move one level back up the org chart.

   You can also click ![up_icon] to make that person the top of the org chart and view their direct and indirect reports, when they are not already the top node in the org chart.

### Viewing Employee Information

The talent browser includes talent card information, a team summary of the employees in the org chart, and also enables you to access a specific employee's details.

The team summary provides information from the perspective of the current manager at the top of the org chart. The information is useful for gaining an at-a-glance look into the health of a part of the company. It displays totals for all of the employees under the manager, including the manager. Drilling down to lower-level managers will display only their specific team.

You cannot access team summary information for business units alongside or above your own. In these instances the option is not displayed.

The toolbar — which displays General by default — can be used to select which employee details are displayed in the employee talent card. This includes info such as, goal progress, succession planning and employee metrics. The employee cards will display critical position and matrix management icons. From the employee's card you can go to their specific module information.

### To View Employee Information

**Prerequisite**

Team Management > Access user type permission to display Team Summary option

**Performance > [Quick Links] Talent Browser**

**Steps**

1. Click the left toolbar button to select which talent card details to display in the talent browser. Within each level, the employees are sorted by last name.

2. Click Team Summary to display the summary information for all of the organization that sits below the manager currently displayed at the top of the org chart.

   The information that can be displayed is fixed, so even if your organization does not use a certain module, its section will still be displayed.

3. Click ![snapshot_icon] on the performance card to display the snapshot, which provides key employee data.
4. To then go to an employee's specific module or complete an action, click on the performance card and select the required option.

**Working with Requisitions and Positions**

If you are a manager with open requisitions and vacant positions, you can access them from the Talent Browser. If Taleo Performance is integrated with Taleo Recruiting, you can view requisitions you are an owner of and create new requisitions. Only requisitions for the logged in user can be accessed. For instance, you cannot select one of your direct reports and view their requisitions. When you create a new requisition you are taken to Taleo Recruiting.

Unlike requisitions, you can view open positions for your reports, along with your own.

You must have scope set to **Direct Reports** to be able to view open requisitions and positions.

**To View Your Open Requisitions**

**Prerequisite**

You must have the required access to Taleo Recruiting.

You must have scope set at **Direct Reports**.

The requisition is open and you are an owner.

*Performance > [Quick Links] Talent Browser*

**Steps**

1. Select **Show Openings**.
   Your open requisitions are listed, displaying the title, ID, recruiter, open date, total candidates, and total ACE candidates.

2. Click the title to display the requisition or click the number of total candidates to display the candidates list.
   You are taken to Taleo Recruiting.

3. From Taleo Recruiting, select and select **Performance** to return to Taleo Performance.

**To Create a Requisition**

**Prerequisite**

You must have the required access to Taleo Recruiting.

*Performance > [Quick Links] Talent Browser*

**Steps**

1. Select **More Actions > Create Requisition** and the Requisition Wizard is displayed.
   You are taken to Taleo Recruiting to create the requisition. To ensure the requisition will be included in your Talent Browser open requisition list you must be an Owner. For details on creating a requisition, see Requisition Management in the Taleo Recruiting User Guide.

2. From Taleo Recruiting, select and select **Performance** to return to Taleo Performance.
To View Vacant Positions

Prerequisite

You must have the scope set at **Direct Reports** and there must be vacant positions.

*Performance > [Quick Links] Talent Browser*

**Steps**

1. Select **Show Openings**.
   The vacant positions for the person currently at the top node of the org chart are displayed.
2. Click and select **View job profile**.
   The position profile is displayed, including the description, competencies, and certification information.
3. Select to return to the Talent Browser or select **[Module] Succession Plan** to view plan details.

Managing Employees from the Employee Card

You can use the options on the employee card to initiate and complete tasks.

Depending on user permissions and the modules you have activated for your system, you can initiate the following actions from the employee card:

- **Snapshot** - From the snapshot you can see general employee information: *Snapshot*.
- **Team management** - This provides self-service features for making employee changes and maintaining employee-manager relationships: *Team Management*.
- **Request mentoring** - A mentor is assigned when a manager requests a mentor for one of his reports, which automatically establishes the mentoring relationship between the selected mentor and mentee: *To Assign a Mentor*.
- **Sending feedback** - General feedback is not related to any specific context and can be sent without having received a request for it: *To Provide General Feedback*. 
Talent Search

Talent Search provides a consistent, user-focused, robust method for finding employees and candidates. It consists of a persistent keyword search box for keyword searches and an advanced search, which combines keywords and employee parameters. Faceted search enhances the existing search capabilities of Taleo Performance providing users with dynamic and refined search results. Facets guide the user through a search providing continuous available search options and results.

When customizable employee metrics are made inactive they are not searchable; only active values show up in facets.

Using Talent Search

You can use Talent Search to find employees and candidates, either via a centralized search or from within modules, and add them to succession plans, talent pools, and requisitions.

- **Searching for Talent** - Using keyword search and advanced search to find people.
- **Understanding Search Behavior** - Facets guide users through a search providing continuous available search options and results.
- **Adding Employees to Modules** - Adding people from search result lists to plans and pools
- **Searching in Context** - Searching from within succession plans and talent pools
- **Understanding Keyword Boolean Operators** - To search effectively, it is important to understand the behavior of boolean operators.

Searching for Talent

Searching for talent involves either a keyword search or an advanced search.

A keyword search enables you to find employees by entering keywords that search through fields associated with employees, such as name, address, employee number, or job title. If you subsequently select *More search options* you are taken to advanced search. From the search results page you can access an employee's Talent Profile, Goal Plan, or other module used in your system. Employee search results are presented as facets, providing dynamic and refined search results that guide users through a search providing continuous available search options and results.

You can also use the *Go To* menu to view an employee as the top node in the Talent Browser. This is useful for HR Administrator and Support users who may be outside of the hierarchy they are trying to view.

Running an advanced search expands on the same keyword search, by enabling you to add employee metrics to the search criteria. You can also choose whether to search for employees or candidates; however, facets are only available for employee searches. From the Advanced Search page you can customize which fields and competencies are to be used as search criteria. People with the Employee Status of *Former Employee* are excluded from search results.

To run a keyword search

**Steps**

1. Enter keywords in the search box and click 📱.
Matching employees are displayed in the Search Results page. To search for candidates you must click "More search options" or "Advanced Search" and run an advanced search.

2. You can select multiple employees to display the Actions menu or click ➤ to display the Go To menu for that employee.

**Result**

You can now add employees to modules or view their details.

**Next Step**

From the Search Results page you can click "More search options" to go to the Advanced Search page. You can then select Clear Entries to remove previous search criteria and Add or Remove Fields to customize the available search criteria.

**To run an advanced search**

**Steps**

1. Click Advanced Search.
2. Select whether you want to search for employees or candidates.
   This changes the available search criteria, as not all search fields are applicable to candidates.
3. If you want to change the available search criteria, click Add or Remove Fields to select which fields can be used for the advanced search.
   While you can select which specific standard fields to include, with user defined fields you can only select the entire group. The search criteria available is affected by your employee profile and employee metrics user permissions.
4. Enter keywords.
   This is the same as those available with a keyword search.
5. Enter values for the custom search criteria.
6. Click Search and matching people are displayed on the Search Results page.

**Result**

You can now add employees to modules or view their details. Selecting multiple people displays the Actions option.

**Next Step**

From the Candidate Search Results page you can click Modify Search to return to the Advanced Search page and change your existing criteria. From the Employee Search Results page you can click More search options to return to the Advanced Search page and change your existing criteria. You can then select Clear Entries to remove previous search criteria.

**Understanding Search Behavior**

The Talent Search features include:

- Extension of the Competency facet to include Manager Competency Rating sub-facet; ability for managers to view employee's competency ratings.
- Intuitive path to navigate back to the search results page.
- Extended functionality of the keyword search that provides search suggestions while entering a keyword.
- Ability to search for a range of values.

**Competency Manager Rating**
The thought behind the Competency Manager Rating facet is that all users should have the ability to see that someone possesses a particular competency, but only users with the appropriate security permissions should be able to view the Manager ratings for that competency. When permitted users select one or more competencies, a list of Manager Competency Ratings displays for each competency selected as sub-facets. The full rating scale displays for each competency and each scale may be different depending on customer configuration. The default display lists the top 10 competencies. If more than 10 are needed, users can add more by selecting Add.

Because Competency is a public facet and Competency Rating is a secure facet, the total count for the Competency Rating facet may not add up to the count displayed for the corresponding Competency facet. Competency Name displays with public counts; Competency Rating displays with secure counts.

Return to Search Results

Taleo Performance provides an intuitive link to guide users back to their Search Results page. By selecting Back to Search Results users are taken back to the Search Results page with the entered keyword, all selected facet values and advanced search criteria preserved. Users may return from 1 level deep into navigation. For example, if a user navigated to the Talent Profile of employee found in the initial search, they can select Back to Search Results and be taken back to the Search Results page. However, if from the Talent Profile users then navigated to the Career Plan, the return path will be lost; this is indicated by the absence of the Back to Search Results link in the ribbon of the application.

Users may return to their original search results from the following pages:

- Talent Profile
- Goal Plan
- Performance Review
- Career Plan
- Development Plan
- Talent Browser

Suggested Input

The functionality of the keyword search has been extended to provide users search suggestions as they enter text. The suggestion input is triggered after users enter at least 3 characters. The 5 most popular matches are displayed as a list that users may select from, or ignore by continuing to type.

Suggestion are based on keywords. This is why entering "Mic" may bring up both Michigan and Michelle.

Range of Values Search

To allow users to broaden search capabilities when using numeric and date fields in Advanced Search criteria, a range of values can now be specified within User - Defined fields. For example, it may be useful to search for the salary range of an employee as it is unlikely that a user would know the exact salary of someone. Or, perhaps a range of start dates would be more useful and return more search results than searching for a single, exact date.

Users must enter From and To values to specify the range desired. New User-Defined fields can be created in the Taleo Performance Administration pages, added to Advanced Search, and then searched.

Searching for a range of values is supported as an Advanced search only; not a Keyword search.

After performing a keyword or advanced search for employees, faceted search options are available on the subsequent search results page. Each facet displays a name, list of choices, and population counts for each choice. Facet values are displayed in descending order determined by the number of items in each facet; the facet values with the highest population count gets displayed first. Each time a facet is used, facet population counts and search results are automatically updated. All facet population counts are updated, except for the selected facet.
which retains its previous choices. Each facet displays a maximum of 5 values by default; users can add values as needed.

Although you can perform a blank keyword search, entering search criteria ensures results are returned quickly.

There are two types of facets: public and secure. The concept behind having public and secure facets is the same as viewing an employee's Talent Profile. Organizational information, such as location, organization, and competencies is information that should be accessible to all, while review ratings, potential, and other metrics should be restricted to employee's managers and HR administrators. While access to the facets varies depending on the user, which facets are available is not configurable.

<table>
<thead>
<tr>
<th>Public Facets</th>
<th>Secure Facets</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Organization</td>
<td>• Review Rating - this is the same value as the Talent Profile Metric, Employee Rating</td>
</tr>
<tr>
<td>• Location</td>
<td>• Manager Competency Rating (presented as a sub-facet of the Competency facet)</td>
</tr>
<tr>
<td>• Job Role</td>
<td>• Potential - values activated/deactivated in Configurable Metrics</td>
</tr>
<tr>
<td>• Competency Name - name only; not rating</td>
<td>• Risk of Loss - values activated/deactivated in Configurable Metrics</td>
</tr>
</tbody>
</table>

Public facet values are displayed in a flat manner. This means that even though there can be a hierarchical, nested nature to the facet choices, they are displayed alongside one another. For instance, if an employee's location was Paris, France, the Location facet would list Paris and France as separate choices and not have the city, Paris, nested under the country, France.

As secure facets are controlled by user type permissions, typically the population counts displayed in the secure facets will be lower than the counts for the public facets. For example, if a manager searched on their own name, the search results would display the manager and the manager's direct reports. When the manager selected the Potential secure facet, the total choices would be one less than the total amount of choices for the Organization facet because the manager does not have user type permissions to view their own metrics.

As well as secure facet results, the availability of the secure facets themselves are controlled by user type permissions. Typically managers and HR Administrators will be able to see secure facets, while employees will not.
Initial Keyword Search Results

Henry Stevenson's keyword search on *savard*, displays Julia Savard and all of her direct reports, which includes Henry. The public facets display corresponding values for all of the employees that were returned by the search. Because of the flat manner in which the facet choices are displayed, this includes listing *Canada* and *Quebec* separately.

As Henry is currently a matrix manager for two of the employees in the search results, his user permissions give him access to only their secure facet values. This is why the population count is only two, when seven people were returned by the search.

Faceted Search Results

When Henry selects the *Potential > Low* secure facet, all of the facets — except the one he just selected — are updated along with the search results list.

Keyword Search Fields

The Personal Information fields from a user's account and some Talent Profile fields in which text can be entered, such as Education, Work Experience and Certification details, are checked when running a keyword search.
When you run a keyword search using a location, it uses the address details from the user account's personal information. This can be different from the Location field in the Talent Profile and the Current Location in the Search Results. Also, when searching on a job title, which comes from the personal information, it may be different than the position name on the user's Talent Card and Talent Profile.

### Keyword fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Certification - certifications chosen from the selector</td>
</tr>
<tr>
<td>Last Name</td>
<td>Other Certification - certifications entered manually</td>
</tr>
<tr>
<td>Username - name used to login</td>
<td>Institution - place of study chosen from the selector</td>
</tr>
<tr>
<td>Job Title</td>
<td>Other Job Title</td>
</tr>
<tr>
<td>Email Address</td>
<td>Other Institution - places of study entered manually</td>
</tr>
<tr>
<td>Manager</td>
<td>Program - programs chosen from the selector</td>
</tr>
<tr>
<td>Location</td>
<td>Other Program - programs entered manually</td>
</tr>
<tr>
<td>Current Position</td>
<td>Zip Code</td>
</tr>
<tr>
<td>Organization</td>
<td>Job Function - job entered manually</td>
</tr>
<tr>
<td>Country</td>
<td>Employee Number</td>
</tr>
<tr>
<td>Competency Name - this is only the name and does not include the description</td>
<td>Other Employer - company entered manually</td>
</tr>
<tr>
<td>City</td>
<td>State</td>
</tr>
<tr>
<td>Employer</td>
<td></td>
</tr>
</tbody>
</table>

### Adding Employees to Modules

From the search results list, employees can be added to talent pools, succession plans, and requisitions.

You can add employees to succession plans, talent pools, and Taleo Recruiting requisitions, depending on which modules you have access to, are responsible for, and have been enabled for your system. When accessing the Go To menu, you do not see all of the items in the system, just those you can directly work with.

While you can add multiple employees to a module at one time, you can only add them to a single module at a time.

### To add employees to modules

**Prerequisite**

Talent search and each of the three modules must be enabled.

You must have completed a search and have a list of employees.

You must have Common > Pool > Manage for talent pools

*Taleo Performance > Search Results*
Steps
1. To add a single employee from the Employee column, click to display the Go To menu and proceed to step 3.
2. To add multiple employees, select the checkboxes for each employee you want to add and click Actions and proceed to step 3.
3. Choose the appropriate module:
   - Add to succession plan - select the plan, sorting by any of the columns if required, and click Select.
   - Add to talent pool - select the pool, which..., and click Select.
   - Add to requisition - select the requisition, which includes the recruiter column that references the person with access to Taleo Performance and Taleo Recruiting, and click Select.
4. Click Yes in the confirmation message box to confirm you want to add the employees.

Result
The employees are added to the module.

Searching in Context
Talent searches can be initiated from within Succession Plans and Talent Pools, from where people can be added directly to the current plan or pool.

When in a Succession Plan or Talent Pool, choosing to add people displays the People Selector, while choosing Advanced Search displays full Talent Search options. When the results of an advanced search are displayed, you can add people directly to the current plan or pool, along with being able to add them to another module or requisition.

To run a Talent Search in a Succession Plan
Prerequisite
Taleo Performance > [Manager Center] Succession Plan
Steps
1. Select the required employee to display their plan.
2. Click and select Open Advanced Search.
3. Select the criteria you want to use to filter your results and click Search.
4. To add a single person from the Employee column, click to display the Go To menu and select Add to current succession plan.
5. To add people, select the checkboxes for each person you want to add and click Actions and select Add to current succession plan.
   If one of the people selected is already a plan member, the Add to current succession plan option is not available.

Result
The people are added to the succession plan as unranked successors. You can return to the plan by clicking .
To run a Talent Search in a Talent Pool

Prerequisite
[Quick Links] Talent Pools

Steps
1. Select a talent pool to display the Members tab.
2. Click and select \textit{Open Advanced Search}.

Selecting \textit{Add Members}, displays the People Selector.
3. Select the criteria you want to use to filter your results and click Search.
4. To add a single person from the Employee column, click to display the Go To menu and select Add to current pool.
5. To add people, select the checkboxes for each person you want to add and click \textit{Actions} and select \textit{Add to current pool}.

If one of the people selected is already a pool member, the Add to current pool option is not available.

Result
The people are added to the pool. You can return to the pool by clicking .

Understanding Keyword Boolean Operators
To search effectively, it is important to understand the behavior of boolean operators.

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wildcards</td>
<td>When you enter words for keyword search, the system treats the search term as if it has wildcard characters added before the first and last character. For instance, searching for \textit{smith} would be treated as if it was entered as \textit{<em>smith</em>} and returns matches such as \textit{naismith}, \textit{smithers} and \textit{wordsmithery}. When this behavior is applied to search terms using \textit{AND}, \textit{OR}, \textit{NOT}, it takes the whole as if it was a single search term. This means that wildcard characters are placed in front of the first letter in the first word and after the last letter in the final word. For instance, searching for \textit{son AND ste} returns matches such as \textit{Karson Stewart} and \textit{Alan Stephenson}. Using \textit{son OR ste} returns those results, as well as \textit{Emily Jackson}, \textit{Madison White}, and \textit{Steven Brown}. When there is no space between your search terms and an operator, you must explicitly enter the * wildcard character. For instance, if your search was \textit{(ara OR Jenkins) OR (Dec)} it could return \textit{Gordon Jenkins} and \textit{Isabelle Martin}. If you then searched for \textit{(<em>ara or Jenkins) OR (Dec</em>)} it could return \textit{Gordon Jenkins}, \textit{Isabelle Martin}, \textit{Barbara Simmons}, and \textit{Michael Decker}.</td>
</tr>
<tr>
<td>AND</td>
<td>By default, words are linked (transparently) by the AND operator and results are the same as including it or wrapping a search term in double quotes. For instance,</td>
</tr>
<tr>
<td>Operator</td>
<td>Description</td>
</tr>
<tr>
<td>----------</td>
<td>-------------</td>
</tr>
<tr>
<td>Arthur Vandele, Vandele AND Arthur, and “Arthur Vandele” all return the same results.</td>
<td><strong>OR</strong> The OR operator enables more expansive searches than the default AND behavior. People containing any of the terms are returned in the search results.</td>
</tr>
<tr>
<td>The NOT operator excludes specific keywords from the search. If you want to exclude multiple terms you can either add multiple NOT operators, such as Smith NOT Michael NOT Gab, or use parentheses, such as Smith NOT (Michael or Gab*).</td>
<td><strong>NOT</strong></td>
</tr>
<tr>
<td>Double quotes are used to search for a specific set of keywords, such as “Arpad Budapest Analyst” will only return people that have those three words associated with their profile. It behaves in the same manner as using multiple ANDs, with the exception that the first and last characters do not automatically have wildcard operators attached to them.</td>
<td><strong>Double quotes</strong></td>
</tr>
<tr>
<td>Search queries enclosed in parentheses are performed before other operations and enable more complicated searches. Effectively you can create mini searches that are combined into larger queries. For example, you could put the search for name, location, and job title into three parenthetical searches within a larger search, such as (*son OR *sen) AND (Copenhagen or Malmo) AND (Analyst).</td>
<td><strong>Parentheses</strong></td>
</tr>
</tbody>
</table>
Employee Management

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Working with Team Management

Team Management

Team Management provides managers with a self-service tool for performing employee changes and maintaining information about their employee-manager relationships.

In the Talent Browser, a manager can request a change for members of his team. The manager can either take an individual he sees on his team and request that he be managed by someone else, or request that someone who is not shown on his team be added to his direct reports. As part of this process, the manager can also update data about the employee.

Depending on the standard field configuration for team management, the manager can have the ability to edit an employee's manager, current job role, location and organization. These changes can be configured to require approval. In such cases, the approval workflow must also be specified as part of the configuration.

In the event that a manager would like to remove a direct report from his team but does not know the name of the new manager, he can simply leave the manager name blank. The HR administrator will be required to assign the employee a new manager in order to approve the request.

Following is a list of possible team management actions:

- Add an employee from another team
- Add a matrix manager
- Change an employee's manager, thus moving the employee to another team
- Change an employee's organization
- Change an employee's location
- Change an employee's job field

Each type of change can be set to require approval, but a justification is always required for a change to be processed.

All requested or rejected changes are indicated on the employee's card in the Talent Browser.

Benefits

- The value of this feature is the ease of use in maintaining this type of critical employee/manager relationship data. By providing managers easy, self-service capability we are increasing the quality and accuracy of data. By providing a workflow for managing it, we provide the governance capability to ensure that HR is properly involved in the process.
- Taleo can be a tool to help an organization clean up their system of record or this could be the ability to do overrides to the system of record for Talent Management purposes. Alternately, this provides the ability to become the system of record, at least for this particular piece of data. This is especially true when combined with TCC. TCC provides Taleo the ability to feed this information to any number of systems that are dependent on manager relationships (time-sheets, expense approvals, etc.).

Adding an Employee to My Team

Adding an employee to my team allows a manager to move an employee from another team to his own team.

Prerequisite

Performance > [Manager Center] Talent Browser
Steps

1. On the required employee card, click and select the Add Employee...
2. In the Employee Addition window, click to display the People Selector.
3. Search for employees in your direct reports, your network or by a general keyword search.
4. In the list of corresponding employee names, click on the desired name to highlight it and click Select.
5. If needed, change the current organization, location and/or job field of the employee by clicking on the corresponding checkbox and then by clicking to open the relevant selector.
6. Proceed for each change in the same manner as you did for the employee name selection.

Result

If approval is required, the request to add the employee will be sent for approval, and then the new employee will be added to the proper manager, as designated in the request.

Removing an Employee from My Team

Steps

1. From the Talent Browser, locate the card of the employee you wish to remove from your team.
2. On the corresponding employee card, click and select Request Employee Change...
3. In the Request Employee Change window, check the Manager option and click to display the Employee Selector.
4. Search for employees in your direct reports, your network or by a general keyword search.
5. In the list of corresponding employee names, click on the desired name to highlight it and click Select.
6. If needed, change the current organization, location and/or job field of the employee by clicking on the corresponding checkbox and then by clicking to open the relevant selector.

Requesting an Employee Change

Prerequisite

When you request to move an employee to another team, the job position might also be moved or left with the current manager, depending on the team management configuration.

Steps

1. From the Talent Browser, locate the card of the employee for which you want to perform a change:
2. On the employee card, click and select Request Employee Change...
3. In the Request Employee Change window, indicate the change you wish to perform by clicking in the appropriate checkbox and then by specifying the new information.
   The Manager field is the only one that can be left blank, in the case you want to move an employee to another team but don't know who the new manager is. In this particular case, the request is automatically sent to the HR administrator.
   If the change requires an approval before being applied, it will be indicated for each change type.
4. Explain the reason of the change by providing a justification, which is mandatory.
5. Click **OK**.

**Result**
The employee's card will display an information bar at the bottom indicating the requested change status. If a change request was rejected, an ![icon] indicator will be displayed, indicating that you need to view the rejection details to either acknowledge the rejection or to modify and resubmit the request. Once the change has been approved, the information bar disappears.

If no approval is required, the change will be done at that moment.

Once an employee is moved to another team, the new manager has full security rights to the employee's information and history. The old manager no longer has access to the employee or his history. The one exception to this rule is if the old manager still has open reviews related to the employee. In that case, the old manager is considered the review “author” and retains ownerships.

**Next Step**
Once an employee change has been requested, it can be canceled if needed by the person who requested the change.

---

**Canceling an Employee Change Request**

**Prerequisite**
Only change requests that require an approval can be canceled, and only by the user who has originally requested the change.

**Steps**
1. From the Talent Browser, locate the employee card corresponding to the change to be canceled.
   
   The card will show a change information bar indicating that a change or a move has been requested.
2. On the corresponding employee card, click ![button] and select **View Change Request Details...**
3. In the Change Request Details window, click **Cancel Request**.

**Result**
The change request is canceled and the change information bar on the employee's card no longer displayed.

---

**Acknowledging a Rejected Employee Change**

**Steps**
1. From the Talent Browser, locate the employee card showing a ![icon] indicator.
2. On the corresponding employee card, click ![button] and select **View Rejection Details**.
3. In the Rejection Details window, do one of the following:
   
   • Click **Acknowledge** to accept the rejection and indicate that you've viewed the details.
   • Click **Resubmit** to display the Request Employee Change window and submit another request.
   • Click **Close** to do nothing.

**Result**
If you selected **Acknowledge** or **Resubmit** the change information bar on the card disappears.
# Team Management Fields

All user interface elements related to Team Management functions are presented in the following table. Each entry in the table includes an element, a description and the part of the application to which the element applies.

<table>
<thead>
<tr>
<th>UI Element</th>
<th>Description</th>
<th>Applicable to</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approval is late</td>
<td>Filter option that displays approval requests that have not been looked, with a due date in the past.</td>
<td>Team Management</td>
<td>Approval Request Filters</td>
</tr>
</tbody>
</table>
| Approval Status  | Filter option that displays approval requests according to their approval status, which can be:  
|                  | • Not Set - Displays all requests, without any consideration to the approval status.  
|                  | • Approval in Progress - Displays pending requests that have not yet been approved.  
|                  | • Approved - Displays no requests as for the moment, approved requests are no longer displayed.  
<p>|                  | • Rejected - Displays approval requests that were rejected. | Team Management     | Approval Request Filters       |
| Assigned to      | Filter option that displays approval requests that are assigned to a specific user. In the case of a change request, the approver is the assignee. | Team Management     | Approval Request Filters       |
| Changes Summary  | Indication of the requested employee changes when related to a change in the organization, location, job field or job role. | Team Management     | Approval Requests              |
| Clear            | Button that resets all filters to null.                                      | Team Management     | Approval Request Filters       |
| Due Date         | Date set automatically to the day following the date the change was requested. | Team Management     | Approval Requests              |
| Employee         | Filter option that displays approval requests related to a specific employee. | Team Management     | Approval Request Filters       |
| Employee         | Name of the employee for whom a change has been requested.                   | Team Management     | Approval Requests              |
| Initiating Manager| Name of the manager who requested the employee change.                       | Team Management     | Approval Requests              |
| Job Field        | Filter option that displays approval requests related to a specific job field. | Team Management     | Approval Request Filters       |
| Job Role         | Filter option that displays approval requests related to a specific job role. | Team Management     | Approval Request Filters       |
| Job Role         | Option used to request the job role of an employee to be changed.            | Team Management     | Employee Change Requests       |
| Justification    | Text box used to enter the reason of the change, which is mandatory for the change request to be saved. | Team Management     | Employee Change Requests       |</p>
<table>
<thead>
<tr>
<th>UI Element</th>
<th>Description</th>
<th>Applicable to</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Filter option that displays approval requests related to a specific location.</td>
<td>Team Management</td>
<td>Approval Request Filters</td>
</tr>
<tr>
<td>Location</td>
<td>Option used to request the location of an employee to be changed.</td>
<td>Team Management</td>
<td>Employee Change Requests</td>
</tr>
<tr>
<td>Managed by</td>
<td>Filter option that displays approval requests that were initiated by a specific manager.</td>
<td>Team Management</td>
<td>Approval Request Filters</td>
</tr>
<tr>
<td>Manager</td>
<td>Option used to request the manager of the employee to be changed when moving an employee to another team. Note that it is also possible to move an employee without specifying the manager when you want to remove an employee from your team but don't know yet where to move that employee.</td>
<td>Team Management</td>
<td>Employee Change Requests</td>
</tr>
<tr>
<td>New Manager</td>
<td>Name of the target manager when an employee is moved to another team.</td>
<td>Team Management</td>
<td>Approval Requests</td>
</tr>
<tr>
<td>Organization</td>
<td>Filter option that displays approval requests related to a specific organization.</td>
<td>Team Management</td>
<td>Approval Request Filters</td>
</tr>
<tr>
<td>Organization</td>
<td>Option used to request the organization of an employee to be changed.</td>
<td>Team Management</td>
<td>Employee Change Requests</td>
</tr>
<tr>
<td>Refresh</td>
<td>Button that executes the search based on the selected filters and displays the corresponding requests in the result grid.</td>
<td>Team Management</td>
<td>Approval Request Filters</td>
</tr>
<tr>
<td>Results Per Page</td>
<td>Drop-down list that allows you to select the number of approval requests to be displayed at once on a single page, the maximum being 40 per page.</td>
<td>Team Management</td>
<td>Approval Requests</td>
</tr>
<tr>
<td>Status</td>
<td>Approval status of the request, which can be Approval in Progress, Approved, Rejected or Not Approved (which occurs when the approval process was canceled).</td>
<td>Team Management</td>
<td>Approval Requests</td>
</tr>
</tbody>
</table>
Working with Matrix Management

Matrix Management

Matrix management provides the ability to assign employees, for a specific period, to matrix or proxy managers that can participate in reviews, goals and any other tasks on behalf of the primary manager.

Matrix management is a technique of managing an organization (or, more commonly, part of an organization) through a series of dual-reporting relationships instead of a more traditional linear management structure. In its simplest form, a matrix configuration may be known as a cross-functional work team, which brings together individuals who report to different parts of the company in order to complete a particular project or task. Another example would be an employee who is managed by multiple supervisors, where the primary manager has named matrix managers for his employees. In all such cases, the matrix managers need to participate in the tasks related to the employees they were assigned, whether that be to write a performance review, approve a goal plan or even to assign development activities.

The matrix management feature provides important management functions:

- Allows managers to share their work responsibilities and administrative tasks with matrix managers who may act on their behalf.
- Allows managers or HR administrators to appoint temporary resource managers. In case that a primary manager is unavailable or on a leave, their tasks and performance management functions may be conducted by the matrix manager.
- Allows matrix managers to participate in performance management functions of employees who work in cross functional teams. It is important to note that to be entitled to participate in a review, matrix managers must also be made review collaborators.

Matrix managers are also added to the security relationships as matrix managers. In other words, matrix managers have both ownership and matrix manager security access.

A matrix manager can participate in various performance management processes such as reviews, goals, development plans, and succession plans. They may participate by conducting the tasks and actions of the primary manager or by directly providing input to these processes. However, for a matrix manager to edit or write an employee review, it must also be assigned as a review collaborator.

In Taleo Performance, matrix management is performed via the Talent Browser and provides the following capabilities:

- **Delegated Employee View** - This view of the organizational chart allows a matrix manager to view all employees that have been delegated to him, indicated by a dotted line. The delegated employee performance card indicates also the number of matrix managers each has.
- **Manage Matrix Management Relationships** - Via the “Manage Matrix Manager” action, a user can appoint a matrix manager to all or some of his employees and assign his tasks. When managing matrix managers, managers can add or remove matrix managers they have assigned as well as view a list of the employees they have delegated to each matrix managers.
- **Task Delegation** - When a manager chooses to delegate his tasks to the matrix manager, the tasks that would normally go to the primary manager are also be sent to the matrix manager, and therefore show in both the primary manager and the matrix manager's task list. The tasks that are delegated are those that are in relation to the delegated employees; for instance, tasks like network invitation sent to the primary manager would not be delegated to the matrix manager. Once the task is completed by either the original manager or one of the matrix managers, the task is considered complete and it is deleted from the task list.
• **Matrix Manager as Review Approvers** - A matrix manager may be selected as an approver type in a review's approval workflow. In such a scenario, the matrix manager will be notified when a review reaches the approval stage in the workflow and will be able to approve/reject the review as desired.

• **Searching Amongst Delegated Employees** - A user that has been named matrix manager can use the People Selector to search for people amongst their delegated employees.

There are various tasks and actions that a matrix manager may perform. In order for the matrix manager to receive tasks and complete the associated actions, the primary manager must have also delegated his tasks to matrix manager. Following is a table listing all the actions than can be performed by matrix managers versus those allowed to review collaborators.

<table>
<thead>
<tr>
<th>Task or Action</th>
<th>Tasks that can be done by a collaborator</th>
<th>Tasks that can be done by a matrix manager*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Write Employee Review (initial, rejected or restarted review)</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Submit for Approval</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Reopen for Approval</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Decide on Approval</td>
<td>No</td>
<td>No (unless the matrix manager is defined as an approver in the review workflow or the original approver has delegated his tasks to this matrix manager)</td>
</tr>
<tr>
<td>Release Employee Review</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Request Acknowledgment</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Acknowledgment</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Send Review Back to Employee</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Cancel Review</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Transfer Review</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Manager Review Collaborators</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Notified of task 'Write Employee Review' or 'Reopen for Approval' via Task List</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Notified of task 'Submit for Approval', 'Release', 'Request Acknowledgment' or 'Close' via Task List</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

*Note that if a matrix relationship is created before review generation, the matrix manager is automatically added as a review collaborator and therefore be able to perform the tasks allowed to collaborators.
Like the primary manager, the matrix manager is entitled to send a review back to an employee under the following conditions:

- As long as the review is in a Draft status and not yet submitted for approval, and
- If the review request configuration indicates that this action is possible (via the setting 'Allow Manager to Restart Review Workflow'.

HR administrators can configure matrix management options as follows:

- View, edit, and delete matrix management relationships created by managers, for any coverage area.
- Create new matrix management relationships on behalf of managers, for any coverage area. The managers are in turn entitled to view, edit, and delete those matrix relationships created by the HR administrator.

**Viewing Your Delegated Employees**

**Steps**

Select [Quick Links] Talent Browser and ensure the scope is set at Direct Reports.

**Result**

If you have delegated employees, they are displayed with dotted lines indicating the matrix management relationships.

**Designating a Matrix Manager for an Employee**

**Prerequisite**

*Performance > [Quick Links] Talent Browser*

This action is only available for the connected manager, and only from his own performance card, which is the highest one in the hierarchy.

**Steps**

1. From your own performance card, select Manage Matrix Manager in the Go to menu.
2. In the Manage Matrix Manager window, click .
3. In the Matrix Manager window, select the name of the matrix manager using the tool.
   a) In the People Selector, specify the type of search and then select the matrix manager from the search results.
   b) Click Select.

Once back on the Matrix Manager window, the name of the selected person will be in the Matrix Manager field.

4. Enter the duration of the matrix management relationship.
5. Indicate whether you want to delegate your tasks to this person by selecting the related option.
6. Specify the employees that you want to delegate to this matrix manager.
   a) Click .
   b) In the People Selector, specify the type of search and then select the delegated employees from the search results.
   c) Make sure to click  to move the selected employees to the Selection list.
d) If you want to also include the direct reports of a selected delegated employee, check the related option.
e) Once all employees are selected, click Select.

7. Back to the Matrix Manager window, verify the information and click OK to save.
8. Back to the Manage Matrix Manager window, click Close.

Result
The matrix management relationship has been defined. The tasks occurring during the specified period will be send to both the original manager and the matrix manager, and will show in their respective task list.

Ending a Matrix Management Relationship

Prerequisite
Performance > [Quick Links] Talent Browser
This action is only available for the connected manager, and only from his own performance card, that is the highest one in the hierarchy.

Steps
1. From your own performance card, select Manage Matrix Manager in the Go to menu.
2. In the Manage Matrix Manager window, select the matrix manager to remove and click .
3. Click Close.

Result
The matrix manager will be removed, as well as all matrix management relationships that you had established.

Managing a Matrix Management Relationship on Behalf of a Manager

Prerequisite
• The user must be an HR administrator.
• The user must have the permission Performance > Team Management > Access administration tools.
• The setting Configuration > [SmartOrg] Settings > Matrix Management Enabled is set to Yes.

Steps
1. From the Taleo Performance home page, log in as the manager for whom you want to either view, create, edit or delete the matrix management relationship.
2. From the Talent Browser of that manager, open the Go to menu of the manager's performance card and select Manage Matrix Manager.
3. In the Manage Matrix Manager window, perform the desired action.
   • To assign a new matrix manager for this manager, click . In the Matrix Manager window, specify how long the matrix management relationship will be valid, indicate whether you want to delegate the tasks to this matrix manager and select the employees to be delegated to this matrix manager.
   • To view or edit an existing matrix management relationship, select the desired matrix manager and select View Details... from the contextual menu. Enter and save your changes if so required.
   • To remove a matrix manager, select the desired matrix manager and click .
4. Once you have completed your task, close the *Manage Matrix Manager* window.

**Result**

The matrix management relationship task will be performed as requested and is automatically applied
HR Administrators Working with Employees

Filtering Approval Requests

Filtering approval requests allows HR administrators to sort pending succession plans, employee goal plans, performance reviews and employee change requests by approval status and to take action, by either rejecting, approving or canceling the approval.

Prerequisite

All approval requests can be viewed by HR administrators as long as the approval request is pending, meaning that no action has been taken by any authorized approvers.

Performance > [HR Administration Tools] Performance Review
Performance > [HR Administration Tools] Succession Plan
Performance > [HR Administration Tools] Goal Plan
Performance > [HR Administration Tools] Team Management
Performance > [HR Administration Tools] Development Plan

Steps

1. Depending on the requests you wish to view or to take action upon, from the Filters panel, specify the elements to be shown in the results by using any combination of filters. Following are a few examples:
   - To view requests depending on their approval status, select the desired approval status in the selection list.
   - To view only the approvals that are late, check the corresponding option.
   - To see approval requests assigned to a specific user, click to select that user's name in the Assigned to field.
   - To see approval requests related to a specific organization, location, job field or job role, employee, incumbent, review cycle, or any other filter option, click the corresponding to select the desired element.

   For a description of filter options, please refer to the Fields and Buttons section associated to the type of approval requests, such as Performance Review Fields and Buttons.

2. Once all filters are specified, click Refresh to show the corresponding approval requests in the result section.

3. If needed, you can change the number of results per page to see more or less results at a time.

Result

The Filter Results section will display the approval requests corresponding to the specified filters. The status bar of the page shows the number of displayed requests over the total.

Next Step

Once the filtered approval requests are displayed, you can approve or reject the request, cancel the approval process or even specify the target manager in the case of employee changes or to complete a currently pending step in the case of performance reviews.
Viewing Employee Change Request Details

Viewing the employee change details allows HR administrators to see the name of the person who requested the change, the subject and the reason of the change.

**Prerequisite**

*HR Administration Tools > Team Management*

**Steps**

1. Filter the requests in order to view the employee for which you want to view request details.
2. In the result grid, click on the name of the desired employee.
3. Once you have viewed the information, click Close to return to the result view.

Viewing Approval Details

Viewing approval details allows HR administrators to see the date the approval request was assigned and the date it is due, as well as the name of all possible approvers.

**Prerequisite**

All approval requests can be viewed by HR administrators as long as the approval request is pending, meaning that no action has been taken by any authorized approvers.

*Performance > [HR Administration Tools] Performance Review*

*Performance > [HR Administration Tools] Succession Plan*

*Performance > [HR Administration Tools] Goal Plan*

*Performance > [HR Administration Tools] Team Management*

*Performance > [HR Administration Tools] Development Plan*

**Steps**

1. Filter the requests in order to view the element for which you want to the approval details.
2. Next to the name of the desired element, click to open the Go To menu and select the View Approval Details option.
3. The Approval Details window will display information about the approval, such as the assigned and due dates as well as all the possible approvers.
4. Once you have viewed the information, click Close to return to the result view.

Assigning a Target Manager

Assigning a target manager is a task that is done by an HR administrator when there is a request to move an employee from one team to another and the manager of the new team has not been specified.

**Prerequisite**

For this task to be available, the change must be related to a team change where the new manager was not specified by the person who requested the change.

*HR Administration Tools > Team Management*
Steps
1. Filter the approval requests in order to view the change request for which you want to specify the new manager.
2. In the result grid, next to the name of the corresponding employee, click ▶ to open the Actions menu and select Change the Target Manager.
3. In the Allocate a Manager window, click ➕ to select the new manager.
4. Once the manager is selected and its name is shown, click OK.
5. If the action was completed successfully, a confirmation message will display and you will have to click Close.

Result
The name of specified manager now shows in the New Manager column.

Accepting an Approval Request
Accepting an approval request consists in basically performing the approval that has been requested.

Prerequisite
To be able to decide on the approval, the approval must have been requested.

Performance > [HR Administration Tools] Performance Review
Performance > [HR Administration Tools] Succession Plan
Performance > [HR Administration Tools] Goal Plan
Performance > [HR Administration Tools] Team Management
Performance > [HR Administration Tools] Development Plan

Steps
1. Filter the approval requests in order to view the element to be approved.
2. In the result grid, select one employee or more:
   • to approve only one element, click ▶ next to the name of the desired element;
   • to approve multiple elements at once, check the desired elements one by one or check the corresponding column header to select all elements on the page.
3. From the Actions menu, select Decide on Approval.
4. In the Request Approval window, select Approve and enter any needed comments.
   If all selected elements CANNOT be approved, a Partial Action window will be displayed, listing the elements for which approval was not possible.
5. Click OK.

Result
Once approved, the request is no longer displayed in the task list.

Rejecting an Approval Request
Rejecting an approval request corresponds to not accepting the approval that is requested.

Prerequisite
To be able to decide on the approval, the element's approval must be in progress.
Steps
1. Filter the approval requests in order to view the element for which you want to reject the approval.
2. In the result grid, select one employee or more:
   • to reject the approval of only one element, click next to the name of the desired element;
   • to reject the approval of multiple elements at once, check the desired elements one by one or check the corresponding column header to select all elements on the page.
3. From the Actions menu, select Decide on Approval.
4. In the Request Approval window, select Reject and enter any needed comments.
5. Click OK.

Result
Once rejected, the approval request remains in the list but with a rejected status.

Canceling an Approval Request
Canceling an approval request consists in terminating the entire approval process as if it had never been assigned.

Prerequisite

Steps
1. Filter the approval requests in order to view the element for which you want to cancel the approval request.
2. In the result grid, select one employee or more:
   • to reject the approval of only one element, click next to the name of the desired element;
   • to reject the approval of multiple elements at once, check the desired elements one by one or check the corresponding column header to select all elements on the page.
3. From the Actions menu, select Cancel Approval Process.
4. When asked to confirm the cancellation, click OK.
   If all selected elements CANNOT be canceled, a Partial Action window will be displayed, listing the elements for which approval cancellation was not possible.

Result
Once canceled, the approval request is no longer displayed.
Native Reporting

Predefined reports can be run from within Taleo Performance, without the need to move to a different module or have special access. This enables reports to be quickly and simply generated on common subjects, such as goal plan status or performance review details.

Native reporting lets managers report from within a module, where they simply select which employees they want to include in the report and what subject they want to report on, based on the available templates.

Reports are available from the Talent Browser, where you can choose to report on the same organizational scope levels you see. You can also select reports in Performance Review lists, Search Results, Talent Pools, or Talent Profiles. Reports are unilingual for 12A, but will support multiple languages in a subsequent release. By default reports are available in Taleo Performance; however, they can also be emailed as attachments with additional configuration.

Standard predefined reports can be set up by Taleo Customer Support; however, these default reports do not include User Defined Fields (UDF) or any company specific formatting. An additional request to Taleo Services would need to be made for custom reporting templates.

Reporting Templates

- Goal Plan Status - Includes goal plan status information about the selected population. The report focuses on the plan status and approval date along with useful employee information such as their location and organization.
- Development Plan Status - Similar to goal plan, except that it deals with development plans.
- Review Status - Includes review status information about the selected population. It is useful for Employee Self-Assessment and Manager Evaluation statuses along with typical employee information.
- Review History - Includes the historical performance review scores for the selected population. The report focuses on the goal score, the competency score, and the Overall Review Rating.
- Performance Review Summary - Can include the review status, goal section score, and competency section score for a designated review cycle and review request.
- Talent Profile - Provides a consolidated view of an employee's information such as their job, work history, skills and qualifications, performance, and development.

Large Profile Picture Also in Native Reporting.

Native Reports display a larger, higher quality employee photo image in the header section. It is the same image as that for the Talent Profile' General section:

- Image format can be .gif, .jpg, or .png.
- Image size is 256 x 256 pixels, passport style.

Some configuration is needed for the photo to display in the Talent Profile and for the user to be able to upload the photo for the Talent Profile. For details see Employee Photo Upload.

Running Reports

Running reports involves creating them, where they are subsequently sent to the printer server for generation, and then viewing the reports via Taleo Performance or email.

- Creating New Reports
- Viewing Reports
Creating New Reports

New reports can be created from throughout the system and take the current context into consideration when initially setting the criteria for the report.

For instance, if you select New Report from the Talent Browser — which is set to display direct reports — then the Direct Reports option is preselected in the New Report window. The reports available to choose from are based on the main components of the system — development and goal plans, performance reviews along with review status and ratings history, talent profile — and will be bespoke for your organization. Reports are not generated on-demand. You may have to wait a number of minutes before you can view the report.

Your reports only contain information on employees you have access to.

To create a new report

Prerequisite

Team Management > Access Reporting user type permission.

Quick Links > Talent Browser > More Actions
Quick Links > Talent Browser > Performance Card
Quick Links > Talent Pools > More Actions
Quick Links > Talent Pools > Employee > Actions menu
Quick Links > Talent Profile > More Actions
Manager Center > Performance Reviews > Employee > Actions menu
Search Results > Employee > Go To menu

Steps

1. Click Create Report.
   Initialy selected employees are based on which context you chose to create the report.

2. Accept the default selection or select one of the following:

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Reports</td>
<td>Includes all of your direct reports</td>
</tr>
<tr>
<td>Direct Reports + One Level</td>
<td>Includes all of your direct reports and their direct reports. Note that the number of employees included in the report is the true number of employees and may exceed the number displayed in the Talent Browser, as there are limits on how many employees can be displayed in the Talent</td>
</tr>
</tbody>
</table>
Options

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Talent Pool</td>
<td>to remove an employee you must also use the People Selector. Click to display a list of talent pools that you have access to. You can only select one pool per report.</td>
</tr>
</tbody>
</table>

The number of employees that will be included in the report is displayed at the bottom.

3. Select a report to display any required parameters.
   Reports are listed by category. Select to display a short description and static preview image of the report layout.

4. Customize the report by entering a name for it and if required select parameters for goal plans and reviews such as, business period, review cycle, or review status.

5. Click Create Report.

Result

The report is sent to the reporting server and you can click OK or click Go to My Reports, where its progress is displayed. When the report is ready it will be accessible from the My Reports window and depending on your system configuration it may also be emailed to you. If the report cannot be created an error message is displayed.

Viewing Reports

Once you have created a report and it has been generated, you can view it from throughout Taleo Performance or reports can be emailed to whoever created them.

While the context you are in can affect the default options available when you want to create a new report, regardless of where you select View My Reports the My Reports window will display the same details. Reports must be viewed within X days or they expire and are deleted from the system.

When you receive a report via email you will receive a link to the report in Taleo Performance and you may also get an attached PDF. Whether an attachment is included is dependent on the PDF not exceeding the attachment file size limit. When you select the link (not the attachment) in the email you may be prompted to sign into Taleo Performance, but then the report will be displayed automatically, without the need for additional navigation. If the report expires before you access it, the report name is no longer click-able.

To View Reports in Taleo Performance

Prerequisite

Team Management > Access Reporting user type permission.

Quick Links > Talent Browser > More Actions
Quick Links > Talent Browser > Performance Card
Quick Links > Talent Pools > More Actions
Quick Links > Talent Pools > Employee > Actions menu
Quick Links > Talent Profile > More Actions
Manager Center > Performance Reviews > Employee > Actions menu
Steps

1. Click View My Reports.
   The My Reports window displays all the reports you have requested, along with how many employees were included in the report, its request date, and status. If the status is Ready it can be viewed; however, if the status is Not Ready, Expired, or Error, it cannot be viewed.

2. Click the report name to open a PDF version in Adobe Reader.
   Only reports that are ready will have active hyperlinks and can be opened. The way the report opens is dependent on your internet browser settings. If you do not have Adobe Reader installed, you will be prompted to do so.

Result

The report opens and you can choose to save it or print it.

Next Step

Click Archived to display additional reports or click Run Again to rerun the report with the most current data.
After viewing, you can delete the report by selecting and clicking Delete from the My Reports window.
Employee Delete

The Employee delete feature provides the ability to filter, review, and delete former employees from the system as required by legal constraints in EMEA and other regions.

The Person Model

A person in the system can be composed of the following parts:

- User Account – to access the system with granted permissions.
- Candidate Account – to apply for jobs through the Career Section.
- Profile – to store the common profile. Employee and Candidate share the same profile.
- Employee – to store employee related data.

When a candidate is hired, he gets a user account and an employee associated to his profile:

- As an employee, the profile is maintained through Taleo Performance Talent Profile
- As a candidate, the profile is maintained through Recruiting and the Career Section.

Employee Delete Strategy

Employee Delete only removes employee specific data.

The Candidate account and common profile are left intact. This will allow the person to be rehired in the future. The person may remain in current pools or succession plans. The Candidate account can eventually be deleted as a distinct task if Recruiting is available in the system.

<table>
<thead>
<tr>
<th>Deleted</th>
<th>Not Deleted</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee Specific Data</strong></td>
<td><strong>Other Taleo Performance Data</strong></td>
</tr>
<tr>
<td>• Employee Metrics</td>
<td>• Business Goals</td>
</tr>
<tr>
<td>• Pictures</td>
<td>• Projects</td>
</tr>
<tr>
<td>• Job History</td>
<td>• Sent Feedbacks</td>
</tr>
<tr>
<td>• Matrix Management</td>
<td>• History of actions taken by the employee</td>
</tr>
<tr>
<td>• Remaining Tasks</td>
<td><strong>Profile and Candidate Data</strong></td>
</tr>
<tr>
<td>• Compensation History</td>
<td>• General Profile (Education, Experience, Certifications, Preferences, etc)</td>
</tr>
<tr>
<td>• Goal Plans, Goals, Tasks (aligned goals will be unlinked)</td>
<td></td>
</tr>
<tr>
<td>Deleted</td>
<td>Not Deleted</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>------------------------------------------</td>
</tr>
<tr>
<td>• Performance Reviews &amp; Review History</td>
<td>• Job Submissions</td>
</tr>
<tr>
<td>• Career Plans</td>
<td>• Offers</td>
</tr>
<tr>
<td>• Development Plans</td>
<td>Talent Pools &amp; Succession Plans</td>
</tr>
<tr>
<td>• Received Feedbacks</td>
<td>• Remains as member (now as an external candidate).</td>
</tr>
<tr>
<td>• Sent Feedback Requests</td>
<td>User Specific Data</td>
</tr>
<tr>
<td></td>
<td>• Remains in the system but inactive.</td>
</tr>
</tbody>
</table>

**Employee Delete Rules**

- Only terminated employees can be deleted.
- Employee must not be owner manager of positions. A transfer of ownership is required prior deletion.
- Employee must not be owner of talent pools. A transfer of ownership is required prior deletion.

**Employee Delete Process**

Employee delete is a three step process:

1. Employee termination
2. Deletion task creation
3. Task monitoring

**Limitations**

- No archiving capabilities at this time.
- The user account cannot be permanently deleted from the system.
  - User accounts are only virtually deleted but remain in the system.
  - The user account does not contain employee related data.
- Products for which the data will not be automatically deleted by the Employee Delete task:
  - Learn
  - Evaluation Management
  - Assessment
  - Passport
  - Talent Exchange
  - Analytics
  - Any other external products integrated with Taleo
Goal Management

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- Working with Goal Plans...................................................................................101
- Working with Business Goals...........................................................................126
- HR Administrators Working with Employee Goal Plans.................................132
Getting Started with Goal Management

Goal Management

The Goal Management feature provides an alternative to traditional organizational hierarchies, one that is used specifically for goal management. In most organizations, the traditional organizational structure used for cost center management is too fine-grained for business goal management. The alternative structure enables the organization to use a simplified organizational structure for goal management. For example, an organization might have multiple cost centers for managing its call center support that might be, in turn, organized by product or geographic location.

The Goal Management feature provides the ability to define employee goals and competency goals, as well as themes, business goals, projects and project milestones.

- A theme is the highest level used for categorizing goals. Themes provide support for organizations that use balanced scorecards in that they allow the categorization of goals and projects into specific scorecard categories such as Financial, Customer, and Development.
- Business goals are qualitative or quantitative statements of an organization's intentions or objectives, for example, “Increase operational efficiency 5%.”
- Projects are discrete efforts by the organization. Projects provide the ability to assign a project owner and to assign goals directly to employees working on the project, for example, “Evaluate, select and implement a talent management solution.”
- Within a project, a milestone is an element that marks the completion of a specific set of tasks or a phase, typically marked by a high-level event such as a completion, an endorsement or signing of a deliverable, a document or a high-level review meeting. An example of a milestone is “Select talent management vendor.”

Benefits

- Provides an organization with versatility in defining themes and goals.
- Allows for qualitative and quantitative measurement of tracking goals.

Goal Alignment

Alignment is a loose concept, but one that allows the organization visibility into how employees are directing their efforts.

There are multiples types of goal alignment supported by the system:

- Business Goal to Theme
- Project to Business Goal
- Business Goal to Business Goal
- Employee Goal to Business Goal
- Employee Goal to Employee Goal

In all of the above cases, the notion of alignment is to show that the subordinates' efforts are in support of the goal being aligned with. Alignment also provides the employees insights as to how their efforts benefit the organization. For example, for a Business Goal of “Increase Operational Efficiency 5%” a call center employee might have a Goal of “Resolve 80% of first level support calls within 5 minutes.”

“Employee to Project” alignment is unique within the system. When an employee is aligned with a project, that means his efforts directly contribute to the completion of the project. In other words, the Project cannot be considered 100% complete until the Employee's goal is 100% complete.
Alignment refers to business objects (initiative, business goals, theme) on which the employee goal is aligned. Sub-goal refers to the hierarchical relationship between two employee goals. By “aligning” an employee goal to its manager goal, you not only set the hierarchical relationship between these two goals, but you also align the sub-goal to the same business objects the parent goal is aligned to. That’s why the alignment library not only displays the business objects, but also your direct manager’s goals.

You can filter the Talent Browser to see who has or is aligned to goals, by selecting a business period and related goal. This allows business leaders to quickly see who in their organization is aligned to their goals and provides information on who is supporting a goal they have and how far down it is cascaded.

**Displaying the List Mode**

You can display your employee goals, business goals or projects using the list mode. The list mode is the default view for employee and business goals and provides a list of items with information on key dates and progress.

**Prerequisite**

- Performance > [Quick Links] My Goal Plan
- Performance > [Quick Links] My Projects
- Performance > [Quick Links] Business Goals
- Performance > [Manager Center] Goal Plan

**Steps**

- Click 🔄.

**Result**

You now view all your items in the form of a list.

**Next Step**

You can also view the items in card or timeline modes.

**Displaying the Timeline Mode**

You can display your employee goals, business goals or projects using the timeline mode. The timeline mode provides a timeline view of an item’s start and due dates.

**Prerequisite**

- Performance > [Quick Links] My Goal Plan
- Performance > [Quick Links] My Projects
- Performance > [Quick Links] Business Goals
- Performance > [Manager Center] Goal Plan

**Steps**

- Click 🔄.

**Result**

You now view all your items in the form of a timeline.

**Next Step**

You can also view items in list mode and card mode.
Working with Goal Plans

Employee Goal

An employee goal is any action or objective that an employee has the intent of attaining during a given business period. Employee goals are added to an employee's goal plan and can later be brought into the review process to be rated.

All employee goals are listed under the Goals tab of the goal plan, separated from the competency goals, which are listed under the Competencies tab.

Employee goals are added to an employee's goal plan by either creating them manually, from scratch, or via alignment to an existing goal. Once employee goals are added to the goal plan, their progress can be updated and they can be brought into the review process to be rated, and also to show up in the Talent Profile.

Employee goals can be added to an employee's goal plan at any time and can also be removed from an employee's goal plan if no longer needed. Depending on the configuration, the organization can determine whether employees and managers have the right to edit employee goals and their associated sub-goals. Depending on user permissions, employee goals can be added, edited or deleted. Employee goals can also be assigned by managers to direct reports. Users can also solicit and provide feedback on employee goals.

Benefits

- Collaboration

A key differentiator for Taleo is the “whiteboard” approach to collaboration. In contrast to the traditional workflow for managing the goal creation phase, both employee and manager can collaborate on the employee's goal plan and acknowledge their agreement when both are satisfied with the plan.

Competency Goal

Competency goals are behaviors that an employee agrees to work on over a given business period. Competency goals added to an employee's goal plan can later be brought into the review process so that rated employee goals and competencies can drive new metrics that will be leveraged throughout the application.

All competencies that are part of an employee goal plan are listed under the Competencies tab of the goal plan, separated from the employee goals, which are listed under the Goals tab.

Competencies are added to an employee's goal plan by either selecting new competencies from the list of available competencies or by automatically including the competencies from the employee's job role. Once competencies are added to the goal plan, they can be brought into the review process to be rated, to then show up in the Talent Profile.

Competencies can be added to an employee's goal plan at any time and can also be removed from an employee's goal plan if no longer needed. Depending on the configuration, the organization can determine whether employees and managers have the right to edit competencies and their associated sub-competencies. Competency definition can be edited by users and sub-competencies can be added, edited or deleted.

Like employee goals, competency goals can be assigned by managers to direct reports. Users can also solicit feedback on competency goals.
Goal Categories

Goal categories are now available for both Employee and Competency goals. Employees can group and organize their goals into different categories to help define each goals purpose.

Goal categories provide the ability for employees to make their goals relevant to their organizations focus areas. Now goals can be associated to categories for the purpose of grouping and relevance. Categories display as a column on the Goal Plan page and in the Goal Details. Categories are also available in subgoals.

- The category feature is in addition to the existing goal alignment feature.
- When a goal has a category, the subgoal will inherit that category. If that category is editable, then users may change the category in the subgoal itself.
- Categories can be selected at the time of goal creation or later during goal editing.

⚠️ Taleo Performance is not delivered with pre-defined default categories.

Goal Measurement Flexibility

Enhancements have been made to make goal measurements more flexible, in turn making goals more meaningful and accurate.

Goals are not always about increasing a value, but are often about decreasing or optimizing some value. For example, a goal's objective may be to reduce overhead costs by 10 percent or to reduce the number of escalations per quarter from 50 down to 10. In these cases, the target value would be lower than the current value. The introduction of the Initial Value field supports decreasing targets and ensures accurate calculation of goal progress. Goal progress is represented as a percentage of the difference between the Initial value and the Target value.

Goal Creation through Alignment

The creation of employee or business goals though alignment provides users with an intuitive way to rapidly create goals that are in line with the key objectives of the organization or with their manager's goals and to tailor them to specific needs.

This goal creation option provides the ability to create goals in the way that many businesses work (via top-down alignment or cascading). Rather than requiring users to create goals from scratch, the creation through alignment offers the ability to select another business or employee goal and to use that goal as a “template” for creating the new goal. Key details are copied from the selected goal and the new goal is automatically aligned to the goal that was selected. The user can then personalize the goal to satisfy different objectives.

Creating goals via alignment is offered as an alternative to creating goals from scratch. Therefore, when creating a new business or employee goal, the user is prompted to select whether to create the goal from scratch or to create it through goal alignment. If users selects the latter, they are provided with a dialog box allowing them to choose which business or employee goals they want to align to.

When the new goal is created from alignment to a another goal, the following information is automatically entered and can be edited if needed.

- Name of the goal
- Description of the goal
- Start and due dates
- Alignment to the goal that was selected to create the current goal
Goal Creation by Copy

New employee goals can be created by copying goals from a previous or current goal plan.

The option to create new goals by copying goals provides users with the ability to quickly create goals by copying one or multiple goals from a previous or current goal plan. Once the new goals are created, users are able to modify the goal as needed.

The advantage of copying existing goals is that some goal information is already provided. For instance, this option allows employees who have the same goal year after year to copy that goal from a previous goal plan. The values that are copied are predetermined and not configurable. The following table indicates the copy behavior of each field in the Employee Goal detail page.

It is possible to copy any employee goal from any previous goal plan or from the current goal plan, with the exception of goals that are tagged as 'System Administrator Goals'. The ability to copy goals is not available for competency goals or business goals.

<table>
<thead>
<tr>
<th>Field</th>
<th>Copied?</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner</td>
<td>No</td>
<td>The value is defaulted to the current employee user.</td>
</tr>
<tr>
<td>Name</td>
<td>Yes</td>
<td>The value is copied from source goal.</td>
</tr>
<tr>
<td>Start Date</td>
<td>No</td>
<td>The value is defaulted to the Goal Plan period start date.</td>
</tr>
<tr>
<td>Due Date</td>
<td>No</td>
<td>The value is defaulted to the Goal Plan period end date.</td>
</tr>
<tr>
<td>Description</td>
<td>Yes</td>
<td>The value is copied from source goal.</td>
</tr>
<tr>
<td>Critical</td>
<td>Yes</td>
<td>The value is copied from source goal.</td>
</tr>
<tr>
<td>Public</td>
<td>Yes</td>
<td>The value is copied from source goal.</td>
</tr>
<tr>
<td>Measurement Type</td>
<td>Yes</td>
<td>The value is copied from source goal.</td>
</tr>
<tr>
<td>Measurement Text</td>
<td>Yes</td>
<td>The value is copied from source goal.</td>
</tr>
<tr>
<td>Actual Value</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Target Value</td>
<td>Yes</td>
<td>The value is copied from source goal.</td>
</tr>
<tr>
<td>Progress</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Stretch Value</td>
<td>Yes</td>
<td>The value is copied from source goal.</td>
</tr>
<tr>
<td>Status</td>
<td>No</td>
<td>The value is defaulted to Not Started.</td>
</tr>
<tr>
<td>Alignment</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Tasks</td>
<td>Yes</td>
<td>The value is copied from source goal. (if Tasks is allowed in goal plan template standard fields configuration)</td>
</tr>
<tr>
<td>Task Weight</td>
<td>Yes</td>
<td>The value is copied from source goal.</td>
</tr>
<tr>
<td>Comments</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>
### Goal Creation using SMART Assistant

This goal creation method offers users guidelines and instructions throughout the creation process of goals. The creation of employee goals using a wizard provides a simple, step-by-step option that allows employees and managers to easily create goals following a defined and logical process. With the SMART assistant, employees can successfully create and align their goals by following simple steps.

SMART methodology refers the following predefined principles:

<table>
<thead>
<tr>
<th>Specific</th>
<th>This step allows the user to define a specific goal by entering the goal's name and description.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measurable</td>
<td>This step allows the user how the goal will be measured.</td>
</tr>
<tr>
<td>Achievable</td>
<td>This step allows to user to determine whether the goal is achievable. It allows user to break</td>
</tr>
<tr>
<td></td>
<td>goal into tasks so that it may be achieved more easily.</td>
</tr>
<tr>
<td>Relevant</td>
<td>This step allows the user to make their goal relevant by aligning it to a manager's goal or a</td>
</tr>
<tr>
<td></td>
<td>business goal.</td>
</tr>
<tr>
<td>Time-bound</td>
<td>This step prompts user to provide realistic time constraints to successfully achieve the goal.</td>
</tr>
</tbody>
</table>

The goal creation assistance is offered only for employee goals. This option is not available for competency goals or business goals.

The steps included in the goal creation assistant are predetermined and not configurable. Note that the instructions fields can not be multilingual, which means that they can only be provided in one language at a time. However, the administrator may include some specific instructions and hyperlinks in the instruction area so that users may benefit from any supporting documentation.

### Batch Goal Assignment

Batch goal assignment provides the ability to assign, at one time, a set of goals to large groups of people within the organization, either by selecting individuals or organizations.

Batch assignment allows managers to assign, in one single transaction, multiple goals to an unlimited number of direct and indirect reports.

The goal assignment process is as follows:

<table>
<thead>
<tr>
<th>Field</th>
<th>Copied?</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weight</td>
<td>Yes</td>
<td>The value is copied from source goal.</td>
</tr>
<tr>
<td>Manager Rating</td>
<td>No</td>
<td>The value is defaulted to None.</td>
</tr>
<tr>
<td>Employee Rating</td>
<td>No</td>
<td>The value is defaulted to None.</td>
</tr>
<tr>
<td>External Identifier</td>
<td>No</td>
<td>Value is defaulted to None.</td>
</tr>
<tr>
<td>Include in Performance Review</td>
<td>Yes</td>
<td>The value is copied from source goal.</td>
</tr>
<tr>
<td>System Administrator Goal</td>
<td>No</td>
<td>The value is defaulted to False.</td>
</tr>
<tr>
<td>Custom Fields</td>
<td>Yes</td>
<td>The values are copied from source goal.</td>
</tr>
</tbody>
</table>
• First, the user needs to have goal assignment rights, which are indicated by the visibility of the icon.
• The goals to be assigned must be selected using the appropriate checkboxes.
• When a manager assigns any of their goals to other employees, he/she can do so by selecting specific employees or employees from specific organizations.
• Following the selection, a confirmation dialog displays the number of employees to whom the selected goals will be assigned to and lets you continue or cancel the assignment.
• To verify if the batch assignment was performed successfully, the Show Process History action shows the goal assignment status and a list of any errors that occurred in the process.

Goal assignment is not possible in two situations:
• in the case of a system-administered goal - a pop-up window will be displayed to inform the user of the nature of the goal.
• if the employee's goal plan is under approval - if the manager attempts to propagate goals to that employee, they will receive an error message letting them know that the plan is currently under approval.

When the goal assignment is successful, the selected goals are added to the goal plan of the selected employees and the related goal information is transferred as per the standard and user-defined field propagation configuration on the goal plan template. The goal alignment is maintained upon goal assignment, except when the manager's goal is aligned to their own manager's goal; in such a situation, the link is broken.

When a goal is assigned, most of the information can be propagated to the selected employees, as per the field propagation configuration. Some field values however are never propagated; these fields are:
• Owner - which is always set to the target employee name.
• Task Weight
• Comments
• Manager Rating
• Employee Rating
• System Administrator Goal - as these goals can never be assigned.

Sub-Goal Functionality

Sub-goal functionality provides the ability to use sub-goals within employee goals.

With the introduction of tasks in goals, a change of functionality was required due the similarity between sub-goals and tasks. The primary difference between sub-goals and tasks is that with tasks, the progress of the goal is calculated based on the sum of the tasks. With sub-goals, this is not the case - the progress of the parent goal has no relationship with the progress of its sub-goals.

It is important to know that only one level deep of sub-goals is allowed, meaning that a goal can only have one level of sub-goal and that a sub-goal cannot have additional sub-goals.

When sub-goals are enabled and one is created, the sub-goal is automatically aligned to the parent goal; this default alignment can however be overwritten at any point.

The following list indicates the alignment behavior for all possible sub-goal actions:
• Creating a sub-goal - The sub-goal is auto-aligned to its parent.
• Updating the alignment of a sub-goal to a manager's goal - The sub-goal is moved as a main employee goal.
• Updating the alignment of a sub-goal to a business goal or project - The sub-goal is moved as a main employee goal.
• Removing the alignment of a sub-goal - The sub-goal is moved as a main employee goal.
Goal Related Tasks

Goal related tasks provide the ability to measure the progress of a goal by the completion of a series of tasks within the goal. Tasks are different from sub-goals in that the completion of the parent goal is calculated by determining the completion of the tasks.

Tasks provide the ability to split a goal into activities and to measure the goal progress based on the average progress of its tasks. Tasks also help to define how the goal will be achieved. Tasks can only be created as part of a goal and do not exist on their own. The fields displayed for Tasks are based on the display of fields in the goal detail. For example, if the Measurement text field is not displayed for goals, it will not appear for tasks either.

On the goal details page, the tasks are displayed in the Measurement section.

When a goal contains tasks, it is the progress of the tasks that need to be updated, not that of the goal, which will be updated automatically upon the progress of the related tasks. For example if there are four tasks in a goal and one is marked at 100% complete, the goal would be 25% complete. Tasks can also have weights, so the above example assumes that all tasks are weighted equally. If the completed task was weighted at 50% and the other three tasks at 16.66%, then the goal progress would be 50% complete.

When a goal plan is printed, the tasks it contains can be part of the printout if the task related print option is selected.

🌟 It is important to know that when sub-goals are also offered, their creation is done via the pull-down menu available for each goal, in the main goal plan page.

Goal Plan Approval

Goal plan approval is always required whenever a goal plan is created or when certain information is modified. The approval is performed according to the approval workflow defined on the corresponding goal plan template.

Goal fields identified as requiring approval can be read-only when a goal plan is under approval. Trying to edit them leads to an error message being displayed. To avoid that, if the required configuration setting is enabled, the current approver for the goal plan can make changes to those fields without affecting the approval process.

The current approver can also add and delete goals from the goal plan in this instance. In a single approver workflow this removes the redundant step of the approver effectively having to restart an approval process for a change he made, which will only return him to the same stage in the process, but with additional steps added.

When a change is made to an already approved goal plan and if the change requires the plan to be approved again, the status of the plan may automatically go from Approved to Not approved, and thus go through the entire approval workflow again.

A change to the following fields constitute a goal definition change and requires the goal plan to be reapproved if it was already approved:

- Goal Name
- Owner
- Due Date
- Description
- Critical
- Measurement Type (Qualitative or Quantitative)
- Measurement Text
- Target Value
- Stretch Value
- Weight
• Alignment

The information regarding approval status is front and center. The user can clearly see the current status and why it is in that status, along with what actions will progress it along the approval workflow. This includes identifying whether parts of the goal plan can be edited and how it affects its current status.

The actions are dependent on your relationship to the goal plan. For instance, if you are an approver and the goal plan status is Approval in Progress, then you will have Approve and Reject options displayed. Conversely, if you are the goal owner, and the goal plan is under approval, you are informed of the date the goal was submitted for approval. It also informs you of any limitations related to editing the goal plan during the approval process.

Printable Goal Plan

A PDF version of an employee's goal plan is offered to provide a printable version of the goal plan for a given period. The printout can show all the information about the goals in the plan or just the some of the goal information.

The printable version is offered to employees to print their own goal plan as well as to managers to print their employees’ goal plans by simply clicking on .

Print options are available to specify which information is to be shown on the printout - Employee Information and Goal Details are always printed and cannot be defined otherwise.

The available print options are dependent on the fields that are set to be displayed on the goal plan template. For instance, if the Comments standard field is not set to be displayed, the Comments print option will not be available for selection.

<table>
<thead>
<tr>
<th>Print Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Information</td>
<td>Always printed and includes the name, the ID and the manager of the employee, which are taken from the Talent Profile.</td>
</tr>
<tr>
<td>Goal Details</td>
<td>Always printed and includes the name and the description of the employee goal or competency goal, as well as its start and due dates, status and related options (Critical, Public, Included in Review).</td>
</tr>
<tr>
<td>Measurement</td>
<td>Shows the actual, target and stretch values of the progress of the goal, the progress percentage as well as any specified measurement text, provided the Measurement text, Target value, Stretch value, Actual value and Percentage complete standard fields in the goal plan template are set to be displayed.</td>
</tr>
<tr>
<td>Tasks</td>
<td>Shows the tasks that are associated to the employee goal, with their respective start and end dates, weight, and progress percentage, provided the Tasks and Task Weight standard fields in the goal plan template as set to be displayed.</td>
</tr>
<tr>
<td>Alignment</td>
<td>Shows the goal the employee goal is aligned to, provided the Alignment standard filed in the goal plan template is set to be displayed.</td>
</tr>
<tr>
<td>Additional Information</td>
<td>Shows all the user-defined fields selected to be displayed in the goal plan template for employee goals, along with their corresponding values.</td>
</tr>
</tbody>
</table>
## Print Options

<table>
<thead>
<tr>
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<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comments</td>
<td>Shows any comment provided about the employee or competency goal, provided the Comments standard field in the goal plan template is set to be displayed.</td>
</tr>
<tr>
<td>Rating</td>
<td>Shows the employee and/or manager rating given to the employee or competency goal, provided the Manager rating value and the Employee rating value standard fields in the goal plan template are set to be displayed.</td>
</tr>
<tr>
<td>Sub-competencies</td>
<td>Shows the list of sub-competencies associated with the competency goals in the goal plan, if there are any.</td>
</tr>
</tbody>
</table>

## Creating an Employee Goal

Creating an employee goal provides the ability to define a goal plan on which to work on and to later align those goals to the business goals of your organization and to include them, if desired, in performance review to be evaluated.

### Prerequisite

**Performance > [Quick Links] My Goal Plan**

**Performance > [Manager Center] Goal Plan**

### Steps

1. If a goal plan has never been created for the selected employee and business period, click Create to create the goal plan. Note that the Create button only appears the first time a plan is created.
2. In the **Goal Plan** page, select the **Goals** tab and click ➕.
3. In the **Create a new goal** window, specify how you want to create the new goal:
   - If you select **Create a new goal through alignment to an existing goal**, click Next to select the goal to align to.
   - If you selected **Create manually**, click Next to enter basic information about the goal.
   - If you select **Create a goal by copying from a previous goal plan**, click Next to select the goal to be copied.
   - If you select **Create a goal by using the SMART assistant**, click Next to go through the assistant by specifying the requested information for each step.
4. Click ➕ when complete.

### Result

The new employee goal is displayed on the **Goal Plan** page, under the **Goals** tab.

### Next Step

Once the goal has been created and defined, the related goal plan usually needs to be approved.

You can quickly create another goal right from the current goal page, by clicking ➕ and repeating the enumerated steps.

## Creating an Employee Goal from Scratch

Creating an employee goal from scratch provides the ability to entirely create a new goal manually.
Prerequisite

Performance > [Quick Links] My Goal Plan
Performance > [Manager Center] Goal Plan

Steps

1. If a goal plan has never been created for the selected employee and business period, click Create to create the goal plan. Note that the Create button only appears the first time a plan is created.
2. In the Goal Plan page, select the Goals tab and click .
3. In the Create a new goal window, select Create manually and click Next.
4. In the next window, enter at least the name of the new goal. You can also enter a description. The start and end date of the goal are by default set to the first and last day of the current year. The dates can be changed by simply selecting other dates.
5. Once the basic goal information is provided, click OK to be taken directly to the goal detail page, where you can enter additional goal information.
6. If you make any information change, click .

Result

The new employee goal is displayed on the Goal Plan page, under the Goals tab.

Next Step

Once the goal has been created and defined, the related goal plan usually needs to be approved.

You can quickly create another goal right from the current goal page by clicking and repeating the enumerated steps.

Creating an Employee Goal via Alignment

Creating an employee goal by alignment provides the ability to duplicate a goal that will be automatically aligned to another goal.

Prerequisite

Performance > [Quick Links] My Goal Plan
Performance > [Manager Center] Goal Plan

Steps

1. If a goal plan has never been created for the selected employee and business period, click Create to create the goal plan. Note that the Create button only appears the first time a plan is created.
2. In the Goal Plan page, select the Goals tab and click .
3. In the Create a new goal window, select Create a new goal through alignment to an existing goal and click Next.
4. In the next window, specify the type of element you want to align to, either a business goal, a project of one of your manager's goals.
5. Once the alignment category is specified, select the specific goal or project you want to align and copy from.
6. Click OK to be taken directly to the goal detail page, where you can enter additional goal information or edit the information copied from the alignment.
7. If you make any information change, click .
Result

The goal detail page will show that the goal is automatically aligned to the selected goal or project and the new employee goal is displayed on the Goal Plan page, under the Goals tab.

Next Step

Once the goal has been created and defined, the related goal plan usually needs to be approved.

You can quickly create another goal right from the current goal page by clicking + and repeating the enumerated steps.

Creating an Employee Goal by Copying Another Goal

Goals can be created by copying other goals; you can create one goal at a time, or copy multiple goals from one goal plan.

Prerequisite

You need to have view and manage access to goals, with the proper constraints. A goal plan might already exist. The related goal plan template allows this action.


Steps

1. From the Goal Plan page, click +.
2. In Create a new goal window, select Create a goal by copying from a previous goal plan and click Next.
3. In the Goal Selector window, specify the business period of the goal plan to choose from and click Refresh to load the related goals.
4. Select the goals that you want to copy by placing a checkmark beside each one.
   If the list of goals scrolls over multiple pages, you can select goals on various pages and they will all be added.
5. Once the selection of goals is complete, click Select.

Result

The system creates the goals, adds them to the current goal plan and populates their content based on the selected goals. If you selected only one goal to copy, the system navigates to the goal details. Otherwise, you are brought to the goal plan.

Next Step

Edit the newly added goal information as needed.

Creating an Employee Goal using the Assistant

Prerequisite

You need to have view and manage access to goals, with the proper constraints. A goal plan might already exist. The related goal plan template allows this action.


Steps

1. From the Goal Plan page, click +.
2. In Create a new goal window, select Create a goal by using the SMART assistant and click Next.
3. In the **SMART Goal Creation** window, go through the assistant by specifying the requested information for each step.

If any field in the assistant is grayed out, it means that the related goal plan template does not allow users to edit this information. As the Name, Start Date and End Date fields are mandatory to create a goal via the assistant, if any of those three fields are not editable, the creation process will be blocked and only canceling the creation will close the assistant window.

a) In the **Specific** step, you must at least provide a name for the goal. Click Next when done.

   The following fields can be displayed.
   
   - Name - Always displayed no matter the standard field configuration. In order to complete this step, since the Name is mandatory, you need to fill in at least this field in order to go to the next step.
   - Description - Displayed if the standard field configuration indicates Displayed AND Editable.

b) In the **Measurable** step, specify the target measure you wish to attain with this goal. The required fields differ depending on the goal measurement type (qualitative or quantitative). If no target values are needed, uncheck the option selected by default. Click Next when done.

   If the goal is qualitative, there is no mandatory field. However, if the goal is quantitative, the Actual and Target values are required when configured to be displayed and editable in the goal plan template. The Measurement Text is never required.

c) In the **Achievable** step, decide whether you want to break the goal into tasks. If so, click **Add Tasks** and enter at least one task. If not, just go to the next step. When all task names are entered, click Next.

   Only the name of tasks are entered via the assistant; the details are provided once the goal is created. If the Tasks field is configured not to be displayed and/or not to be editable, the **Add Tasks** button will be disabled and you will not be entitled to break down the goal into tasks.

   In you decide that you don't want tasks after all, you will need to delete each task you created.

d) In the **Relevant** step, decide whether you want to specify how the goal relates to other goals by aligning it. If so, click **Align**. In the **Alignment** window, select the goal category, if applicable and the specific goal you want to align to and click OK.

   The available object types to align to, such as manager goals, business goals, and business projects, are determined by the goal plan template settings.

   If the alignment fields are disabled, the step will be displayed but will not be available.

e) In the **Time-bound** step, you must specify start and end dates for the goal.

   By default, the start and end dates of the related goal plan are provided.

f) At any time, you can use the **Previous** and **Next** buttons to navigate to specific steps of the assistant to review and/or edit information.

4. Once all steps are completed, click **Finish** to complete the creation process and add the goal to the goal plan.

**Result**

The system creates the goal, and tasks if applicable, and populates its content based on provided information. The goal is added to the goal plan.

**Next Step**

As needed, access the goal detail page to edit existing information or to add more information.
Including an Employee Goal in a Performance Review

Including a goal in a performance review is done when you want a goal to be part of a performance review and therefore be evaluated.

**Prerequisite**

**Steps**
1. Open an employee goal.
   
   If an employee goal plan has never been created, a message appears indicating that there is no plan for the employee and business period combination and asking whether you want to create one. If so, click Create. Note that the Create button only appears the first time a plan is created.
2. In the *Goal Plan* page, under the *Goals* tab, select the goal that you want to be part of the performance review.
3. In the goal detail page, under the *Specifications* section, check the *Include in Performance Review* option.
4. Click.

**Result**

The next time this employee's review will be generated, it will include the specified goal.

Creating an Employee Sub-goal

You can create sub-goals for any existing employee goals.

**Prerequisite**

A employee sub-goal can only be created for an existing employee goal.

*Performance > [Quick Links] My Goal Plan*  
*Performance > [Manager Center] Goal Plan*

**Steps**
1. In the *Goal Plan* page, under the *Goals* tab, select the employee goal for which you want to create a sub-goal and click ✗ to select *Add Employee Subgoal*.
2. In the *Create a new goal* window, enter the basic information about the new sub-goal.
3. Click OK to display the goal detail page.
4. Provide extra information as required and click ✗ when complete.

**Result**

The new employee sub-goal displays in the goal list by clicking the arrow beside the parent goal.

Creating a Task Related to an Employee Goal

Creating tasks provides the ability to break a goal into tasks, for which progress will determine the progress of the related goal.

**Prerequisite**

Tasks can only be created for an existing goal.
The permission to create tasks is not offered for all goal plans. The display of the Break Goal In Tasks button indicates that this feature is enabled.

**Performance > [Quick Links] My Goal Plan**

**Performance > [Manager Center] Goal Plan**

**Steps**

1. In the Goal Plan page, under the Goals tab, select the employee goal for which you want to create tasks.
2. In the goal detail page, scroll to the Measurement section and click on Break Goal In Tasks.
   
   If tasks already exist, click on Create....
3. In the Create Task window, provide the task information.
   
   If you want the progress of the task to be used to calculate the progress of the related goal, make sure to check the User actual/target values to measure progress option.
4. If you want to create another task, click Save and Create Another and repeat the previous step.
5. When task creation is complete, click OK.

**Result**

All tasks created for a goal are displayed in the Measurement section, under Tasks.

---

**Adding a Competency to a Goal Plan**

Adding a competency to a goal plan provides the ability to set the improvement of this competency as a goal for the given business period.

**Prerequisite**

The use of competency goals depends on the configuration of the goal plan template. The display of the Competencies tab in the goal plan page indicates competency goals are allowed.

**Performance > [Quick Links] My Goal Plan**

**Performance > [Manager Center] Goal Plan**

**Steps**

1. If a goal plan has never been created for the selected employee and business period, click Create to create the goal plan. Note that the Create button only appears the first time a plan is created.
2. In the Goal Plan page, select the Competencies tab and click +.
3. In the Competency Selector window, select the competency to add to the goal plan.
4. Click Select.
5. Provide the competency goal detail information.
6. Click when complete.

**Result**

The competency is added to the goal plan, under the Competencies tab.

**Next Step**

You can quickly add another competency by clicking +, either from the goal plan or competency goal detail page.

---

**Creating a Sub-competency Goal**

This task allows the user to add an extra behavior for a specific competency goal in his goal plan.
Prerequisite
The goal plan template has been configured to display and edit sub-competencies.

Performance > [Quick Links] My Goal Plan

Performance > [Manager Center] Goal Plan

Steps
1. If a goal plan has never been created for the selected employee and business period, click Create to create the goal plan. Note that the Create button only appears the first time a plan is created.
2. In the Goal Plan page, select the Competencies tab and select the competency to which you want to add a sub-competency.
3. In the Competency Goal page, scroll to the Sub-competencies section and click Add.
4. In the New Sub-Competency window, enter the description of the behavior to be considered as a sub-competency.
5. Click Done.
6. Click when complete.

Showing/Hiding Goal Instructions
The display of the goal instructions allows users to understand what is expected from them in terms of goal management tasks. The same instructions apply to all the goals within the same goal plan.

Prerequisite
Goal instructions must have been defined for them to show in the goal plan. If no goal instructions were created, the actions to show or hide the instructions will not be available.

Performance > [Quick Links] My Goal Plan

Performance > [Manager Center] Goal Plan

Steps
1. To show the goal instructions, select the Show Instructions option from the More Actions pull-down menu or simply the Show Instructions button if you are on the goal detail page.
   The instructions will be displayed in the top section of the window. If the instructions are not available in your language, they are displayed in the base language of your system.
2. To hide the instructions, simply click the X at the right end of that section.

Editing Goals
Whether before, during, or after the goal plan approval process, goals can be edited, deleted and removed from goal plans.

Before a goal plan has been approved, there are typically no restrictions as to what you can edit.

When you select a goal in an approved goal plan, the fields that require re-approval if edited are indicated. When changes are made it is clearly identified why the goal plan status has changed to Not Approved, in the goal plan history and then the subsequent goal detail history.

When they system is configured for it, the current approver for the goal plan can make changes to fields that typically require re-approval without affecting the approval process. The approver can also add and delete goals from a goal plan that is under approval when the setting is enabled.
Editing an Employee Goal or Sub-goal

Prerequisite

Performance > [Quick Links] My Goal Plan

Performance > [Manager Center] Goal Plan

Steps

1. Access the desired goal plan by selecting the appropriate business period.
2. In the Goal Plan page, select the Goals tab and then select the goal or subgoal you want to edit from the list of goals.
3. In the goal detail page, make your changes and click OK.
4. When the confirmation window appears, click OK.

Result

Your changes are saved and the status of the related goal plan might change depending on the configuration of the employee goal changes needing approval. So, if a certain goal change has been configured to need approval, then the goal plan will return to a Not Approved status following such a change.

Editing a Sub-competency Goal

Prerequisite

The goal plan template has been configured to display and edit sub-competencies.

Performance > [Quick Links] My Goal Plan

Performance > [Manager Center] Goal Plan

Steps

1. In the Goal Plan page, select the Competencies tab.
2. Select the competency related to the sub-competency to be changed.
3. Mouse over the desired sub-competency and select Edit.
4. Make your changes and click Done.
5. Click when complete to save the new information.

Editing a Task Related to an Employee Goal

Prerequisite

Tasks can only be edited when the goal plan is under approval if you are the current approver and the required configuration setting is enabled.

Performance > [Quick Links] My Goal Plan

Performance > [Manager Center] Goal Plan

Steps

1. In the Goal Plan page, select the Goals tab and then select the goal for which you want to edit a task.
2. In the goal detail page, scroll to the Measurement section, under Tasks.
3. Click click to select the Edit action.
4. In the Edit Task window, make the desired changes and click OK.
Result
The task will reflect the changes made.

Next Step
If the change made requires the plan to be re-approved, an approval request will need to be performed.

Deleting a Task Related to an Employee Goal

Prerequisite
Tasks cannot be deleted if the related goal plan is under approval, unless you are the current approver and the required configuration settings have been enabled.

Steps
1. In the Goal Plan page, under the Goals tab, select the employee goal for which you want to delete a task.
2. In the goal detail page, scroll to the Measurement section, under Tasks.
3. Click next to the desired goal to select the Delete action.
4. In the confirmation box, click Yes to confirm the deletion.

Result
The task will be deleted from the list of tasks.

Removing a Goal or Sub-goal

Prerequisite

Steps
1. In the Goal Plan page, select the Goals or Competencies tab, depending on the type of goal to remove.
2. Hover over the goal you wish to remove and click to select Remove...
3. In the confirmation window, click Yes to confirm the action.

Result
The goal or sub-goal is no longer displayed in the Goal Plan.

Removing a Sub-competency Goal

Prerequisite
The goal plan template has been configured to display and edit sub-competencies.

Steps
1. In the Goal Plan page, select the Competencies tab.
2. Select the competency related to the sub-competency to be removed.
3. Mouse over the desired sub-competency and click **Remove**.
4. Confirm the deletion.
5. Click ✗ when complete to save the goal plan.

### Assigning Employee or Competency Goals

Assigning one or multiple goals to direct reports allows managers to easily and quickly propagate one or multiple employee or competency goals to their direct reports.

**Prerequisite**

For this functionality to be possible, you need to be a manager and goal assignment settings need to have been set to allow the manager to assign goals. When such permission is granted to a manager, the related goal assignment icon - 

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**Steps**

1. In the **Goal Plan** page, select the Goals or the Competencies tab, depending on the type of goal to assign.
2. Select the goals to be assigned and click ✗.
3. In the **Goal Assignment** window, select the employees to whom you want to assign the selected goals by first selecting the type of employees that being **Specific employees** or **Employees from specific organizations**.
4. Click ✗ to open the corresponding selector.
5. Depending on the selector:
   - In the People Selector, select the specific employees either in your direct reports or by performing a keyword search. Make sure to click ✗ to move your selections in the **Selection** section.
   - In the Organization Selector, choose one or multiple organizations in the list or perform a keyword search. Click **Select**.
6. Once your selections of employees to whom you want to assign goals to is done and back on the **Goal Assignment** window, click **OK**.
7. When the confirmation message is displayed, click **OK**.

   Note that goals cannot be added to an employee's goal plan if the employee's goal plan is under approval. If the manager attempts to propagate goals to that employee, a window displayed listing the employees for whom the goal could not be assigned and why.

**Result**

The assigned goal will show in the goal plan of the selected employees and will display the information that was set to be propagated. Goals might also be assigned to sub-direct reports and sub-organizations, if so defined. If Alignment was set to be propagated, vertically assigned goals - those from a manager to a direct or indirect report - are automatically aligned to the manager's goal. When a manager assigns a sub-goal to an employee, the employee's new goal is not aligned to that sub-goal. It will be aligned to the manager's main goal, which that sub-goal was associated with. If a goal is assigned upwards, ie. from an employee to a manager, then the alignment is not automatically propagated.
Aligning an Employee Goal

Aligning an employee goal allows you to demonstrate your efforts in support of a business project or a business goal of your organization or one of the employee's manager goal.

Prerequisite

A employee goal can be aligned to only one business goal, business project or manager goal.

Performance > [Quick Links] My Goal Plan

Performance > [Manager Center] Goal Plan

Steps
1. In the Goal Plan page, select the Goals tab and click the name of the goal or sub-goal you wish to align.
2. In the goal detail page, scroll to the Alignment section and click Align....
3. In the Alignment window, select the category of the item you wish to align the goal to and select the desired item from the list of corresponding goals or projects.
4. Click OK to perform the alignment and return to the goal detail page.

Result

A hierarchal view of the goal alignment is now displayed in the Alignment section.

Changing the Alignment of an Employee Goal

The alignment of an employee goal is changed to modify the item the goal is aligned to.

Prerequisite

Performance > [Quick Links] My Goal Plan

Performance > [Manager Center] Goal Plan

Steps
1. In the Goal Plan page, under the Goals tab, click the name of the goal or sub-goal for which you want to change the alignment.
2. In the goal detail page, scroll to the Alignment section and click Clear to remove the existing alignment.
3. You need to click Align... before proceeding to the new alignment.
4. Click Align...
5. In the Alignment window, select the category of the item you wish to align the goal to and select the desired item from the list of corresponding goals or projects.
6. Click OK to perform the alignment and return to the goal detail page.

Result

A hierarchal view of the new goal alignment is now displayed in the Alignment section.

Entering Goal Comments

Goal comments can be entered by both the manager and the employee on any goal in the goal plan. However, each user is entitled to modify or remove their own comments, and not the comments entered by the other party.

Prerequisite

To take advantage of this feature, the Comments field must be set to be displayed and editable in the goal plan template; otherwise, the Comments section will just not be shown in the goal detail page.
Steps
1. In the Goal Plan page, select the Goals or Competencies tab, depending on the type of the goal and then select the goal for which you want to enter comments.
2. In the goal detail page, scroll to the Comments section and click Add.
3. In the Add Comment window, enter and format your comment text and click Done.

   Repeat this step for each comment to be added.

Result
All comments are displayed under the Comments section of the goal detail page, with the latest one showing at the top of the list.

Next Step
Comments can be edited and removed as needed by the author of the comment.

Editing Goal Comments
Goal comments can only be edited by the user who originally created the comment.

Prerequisite
To take advantage of this feature, the Comments field must be set to be displayed and editable in the goal plan template; otherwise, the Comments section will just not be shown in the goal detail page.

Steps
1. In the Goal Plan page, select the Goals or Competencies tab according to the type of the goal and select the goal for which you want to edit comments.
2. In the goal detail page, scroll to the Comments section and hover the comment you want to edit to see the Edit and Remove buttons appear.
3. Click Edit.
4. In the text editing box, edit the comment and click Done.

Result
The edited comment will be displayed under the Comments section of the goal detail page, in the same order as the original comment.

Next Step
Comments can be edited and removed as needed.

Removing Goal Comments
Goal comments can only be removed by the user who originally created the comment.

Prerequisite
To take advantage of this feature, the Comments field must be set to be displayed and editable in the goal plan template; otherwise, the Comments section will just not be shown in the goal detail page.
Performance > [Manager Center] Goal Plan

Steps
1. In the Goal Plan page, under the Goals or Competencies tab, select the goal for which you want to edit comments.
2. In the goal detail page, scroll to the Comments section and hover the comment you want to remove to see the Edit and Remove buttons appear.
3. Click Remove.
4. Confirm the removal by clicking Yes in the confirmation popup.

Result
The removed comment will no longer be displayed under the Comments section of the goal detail page.

Goal and Task Quick Progress Update

The progress of business goals, employee goals and tasks can be quickly updated right from the goal or task list, providing a quick method to update the completion progress of goals and tasks.

In addition to being able to update the progress via the goal or task detail page, users can also indicate the progression of their goals directly from the list page and the progression of the tasks related to a goal from the list of tasks in the goal details page, via the Progress column.

The progress column displays a Start button when the goal or task status is Not Started and shows a progress bar when the status is other than Not Started. Clicking on the Start button updates the status to In Progress. The progress of a goal is updated by clicking on the down-arrow of the progress bar, which displays a small drop-down window that is different depending on the situation:

- If the measurement type of the goal or task is Qualitative - The progress is updated using a progress slider.
- If the measurement type of the goal or task is Quantitative - The progress is updated by entering the Actual and Target values. If the progress slider is used, it will update the Actual value.
- If the goal includes tasks - The progress cannot be updated directly from the goal list as the goal's progress is dependent on the progress of the tasks, which however can be updated directly from the list of tasks within a goal's detail page.

Updating the Progress of a Goal

The progress of a goal can be updated via the goal detail page or right from the list of goals in the goal plan, under the Goals or Competencies tab.

Prerequisite

Performance > [Quick Links] My Goal Plan
Performance > [Manager Center] Goal Plan

Steps
1. In the Goal Plan page, under the Goals or Competencies tab, locate the goal for which you want to update the progress.
2. In Progress column, click Start if the progress has never been updated; otherwise, click ▼ to open the small pop-up showing the progress fields that can be updated.
3. Update the progress using the progress slider or the value fields.
4. Click ✓.

Result
The goal progress will be updated as entered and will also show in the goal detail page.
**Viewing Goal Plan Changes**

Viewing goal plan changes provides the ability to see the details of all changes made to the goals included in the selected goal plan. It is also possible to see the exact goals that were modified by selecting the flagging option.

**Prerequisite**

For the flagging option to display, the goal plan must have been approved at least once and changes made since.

*Performance > [Quick Links] My Goal Plan*

*Performance > [Manager Center] Goal Plan*

**Steps**

1. In the *Goal Plan* page, check the *Flag added/modified goals since last approval* option if you want to see which goals were changed and if that option is available.
2. Under the *History* tab, if you have used the flag option, specify whether you want to display all events or just the new events since the last approval to see the appropriate list of events; otherwise, the events will all be listed.

**Requesting Approval**

Both the employee and the employee's manager can access the employee's goal plan and create goals. A manager can edit and delete goals created by the employee. Both users must indicate their acceptance of the plan before it is considered approved.

**Prerequisite**

*Performance > [Quick Links] My Goal Plan*

*Performance > [Manager Center] Goal Plan*

**Steps**

1. In the *Goal Plan* page, review the employee and competency goals and select *More Actions > Request Approval*.
2. In the confirmation window, click *OK*.

**Result**

The approval request is sent to the defined approvers, as defined in the approval workflow, and will show in the recipients’ task list.

**Approving via Email Requests**

**Prerequisite**

Your implementation uses approval request emails with variable links to either development plans, goal plans, performance reviews, or succession plans.

**Steps**

1. Open the email and click the hyper link indicating it will take you to the object requiring approval.
2. Login to Taleo Performance if required or if you are in a single sign-on (SSO) environment you will go directly to the item.
If you do not have the required security access or there is a problem with the variable link, you will be redirected to the Taleo Performance start page.

3. Select the Approval option to begin the approval process.

**Result**

Approval will move the item to the next step in the approval process, while rejecting the item will require the employee to make modifications and resubmit.

## Printing a Goal Plan

The goal plan can be printed to show complete or partial goal information, as specified.

**Prerequisite**

- **Performance** > [Quick Links] **My Goal Plan**
- **Performance** > [Quick Links] **Business Goals**
- **Performance** > [Manager Center] **Goal Plan**

**Steps**

1. Open the goal plan you wish to print.
2. Click ![Print icon](printer.png).
3. In the Print Options window, specify the information you wish to see on the printout by checking the appropriate options.
4. Click Print.

   The goal plan will be opened as a PDF document.
5. Use the print function of Adobe Reader to print the document.

**Result**

The goal plan is viewed as a PDF and can then be printed if so desired.

## Goals Fields

All fields related to employee or business goals in Taleo Performance are presented in the table below, along with a description and related possible values, when predefined. Each field also indicates the type of information it applies to and the related header. **IMPORTANT** - Since most of the fields are configurable and can be set to be shown or not, it is possible that some fields do not show for some goals.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Applicable to</th>
<th>Header</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="icon1.png" alt="Icon" /></td>
<td>Icon that allows a manager to assign a selected goal or sub-goal to other employees.</td>
<td>Goal Plans</td>
<td>Goal Plans</td>
</tr>
<tr>
<td><img src="icon2.png" alt="Icon" /></td>
<td>Icon that displays the name of the related goal plan template.</td>
<td>Goal Plans</td>
<td>Goal Plans</td>
</tr>
<tr>
<td><img src="icon3.png" alt="Icon" /></td>
<td>Icon that indicates that new feedback has been provided in regards to the goal and has not yet been read.</td>
<td>Goal Plans</td>
<td>Goal Plans</td>
</tr>
<tr>
<td><img src="icon4.png" alt="Icon" /></td>
<td>Icon that indicates that the achievement of the goal is critical.</td>
<td>Goal Plans</td>
<td>Business Goals</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Applicable to</td>
<td>Header</td>
</tr>
<tr>
<td>-------</td>
<td>-------------</td>
<td>---------------</td>
<td>--------</td>
</tr>
<tr>
<td><img src="image" alt="Icon that indicates that the achievement of the goal is overdue, since the due date of the goal is past." /></td>
<td>Icon that indicates that the achievement of the goal is overdue, since the due date of the goal is past.</td>
<td>Goal Plans</td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Icon that indicates that the goal or sub-goal is not aligned." /></td>
<td>Icon that indicates that the goal or sub-goal is not aligned.</td>
<td>Goal Plans</td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Icon that provides access to a list of all the goals in the goal plan." /></td>
<td>Icon that provides access to a list of all the goals in the goal plan.</td>
<td>Goal Plans</td>
<td>Business Goals</td>
</tr>
<tr>
<td><img src="image" alt="Icon that provides access to a timeline view of all the goals in the goal plan." /></td>
<td>Icon that provides access to a timeline view of all the goals in the goal plan.</td>
<td>Goal Plans</td>
<td>Business Goals</td>
</tr>
<tr>
<td><img src="image" alt="Icon that provides the ability to add an element (that being a goal, sub-goal, business project or business milestone, depending on the type of goal)." /></td>
<td>Icon that provides the ability to add an element (that being a goal, sub-goal, business project or business milestone, depending on the type of goal).</td>
<td>Goal Plans</td>
<td>Business Goals</td>
</tr>
<tr>
<td><img src="image" alt="Icon that provides the ability to display the details about the selected element." /></td>
<td>Icon that provides the ability to display the details about the selected element.</td>
<td>Goal Plans</td>
<td>Business Goals</td>
</tr>
<tr>
<td><img src="image" alt="Icon that provides the ability to remove an element." /></td>
<td>Icon that provides the ability to remove an element.</td>
<td>Goal Plans</td>
<td>Business Goals</td>
</tr>
<tr>
<td><img src="image" alt="Icon that represents a business goal." /></td>
<td>Icon that represents a business goal.</td>
<td>Business Goals</td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Icon that represents an employee goal." /></td>
<td>Icon that represents an employee goal.</td>
<td>Goal Plans</td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Icon that provides the ability to print the business or employee goal plan." /></td>
<td>Icon that provides the ability to print the business or employee goal plan.</td>
<td>Goal Plans</td>
<td>Business Goals</td>
</tr>
<tr>
<td>Actual Value</td>
<td>Quantitative measurement field that indicates the actual completion of the goal, expressed as a number with or without decimals. The Progress percentage is determined according to the Actual Value over the Target Value.</td>
<td>Goal Plans</td>
<td>Business Goals</td>
</tr>
<tr>
<td>Additional Information</td>
<td>Title of the section that shows additional information about the goal that has been defined by the company. This section will display all user-defined fields that have been defined for the goal plan template. However, if no user-defined fields were defined, this section will be empty.</td>
<td>Goal Plans</td>
<td>Additional Information</td>
</tr>
<tr>
<td>Aligned to</td>
<td>Box that shows the business goals, manager's goal and/or projects the goal is aligned to.</td>
<td>Goal Plans</td>
<td>Alignment</td>
</tr>
<tr>
<td>Aligned to me</td>
<td>List of goals that are aligned to the selected employee.</td>
<td>Goal Plans</td>
<td>Alignment</td>
</tr>
<tr>
<td>Alignment</td>
<td>Title of the section that shows alignment information about the goal.</td>
<td>Goal Plans</td>
<td>Alignment</td>
</tr>
<tr>
<td>Business Theme</td>
<td>Business theme associated to the business goal.</td>
<td>Business Goals</td>
<td>General</td>
</tr>
<tr>
<td>Comments</td>
<td>Title of the section that contains comments provided in relation to the goal.</td>
<td>Goal Plans</td>
<td>Comments</td>
</tr>
<tr>
<td>Critical</td>
<td>Check box indicating that the achievement of the goal is critical.</td>
<td>Goal Plans</td>
<td>Business Goals</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Applicable to</td>
<td>Header</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>------------------------</td>
<td>----------</td>
</tr>
<tr>
<td>Description</td>
<td>Text box providing a description of the goal. The character limit is 4000.</td>
<td>Goal Plans Business Goals</td>
<td>Specifications</td>
</tr>
<tr>
<td>Due Date</td>
<td>Indicates the date scheduled for the goal to be achieved.</td>
<td>Goal Plans Business Goals</td>
<td>General</td>
</tr>
<tr>
<td>Employee's Rating</td>
<td>Slider bar that allows the employee to provide his evaluation of the achievement of the goal. The employee's rating is visible to the manager, but not editable.</td>
<td>Goal Plans Business Goals</td>
<td>Rating</td>
</tr>
<tr>
<td>External Identifier</td>
<td>Field that can contain an alternate goal identifier.</td>
<td>Goal Plans Specifications</td>
<td></td>
</tr>
<tr>
<td>Goal Detail History</td>
<td>Title of the section that shows a list of all the events that have been performed for the goal.</td>
<td>Goal Plans Goal Detail History</td>
<td></td>
</tr>
<tr>
<td>Include in Performance Review</td>
<td>Indicates that the goal is automatically included in the employee's performance review when goals are populated from the goal plan.</td>
<td>Goal Plans Specifications</td>
<td></td>
</tr>
<tr>
<td>Measurement</td>
<td>Title of the section that shows information about the measurement of the goal.</td>
<td>Goal Plans Business Goals</td>
<td>Measurement</td>
</tr>
<tr>
<td>Measurement Text</td>
<td>Text box that contains a description of the measurement type. The character limit is 1000.</td>
<td>Goal Plans Business Goals</td>
<td>Measurement</td>
</tr>
<tr>
<td>Measurement type</td>
<td>There are two measurement type can be selected in the drop-down list. Goals can be measured in a quantitative or qualitative manner. Depending on the measurement type selected, the fields in the Measurement section will be slightly different.</td>
<td>Goal Plans Business Goals</td>
<td>Measurement</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the goal.</td>
<td>Goal Plans Business Goals</td>
<td>General</td>
</tr>
<tr>
<td>Organization</td>
<td>Organization associated to the business goal.</td>
<td>Business Goals General</td>
<td></td>
</tr>
<tr>
<td>Owner</td>
<td>Indicates who created the goal.</td>
<td>Goal Plans General</td>
<td></td>
</tr>
<tr>
<td>Progress</td>
<td>Dynamic bar that indicates the level of progression towards goal achievement.</td>
<td>Goal Plans Business Goals</td>
<td>Measurement</td>
</tr>
<tr>
<td>Public</td>
<td>Check box indicating that the goal is public. When this option is not selected, therefore, private, the goal cannot be seen by subordinates and therefore cannot be aligned to.</td>
<td>Goal Plans Specifications</td>
<td></td>
</tr>
<tr>
<td>Qualitative</td>
<td>Goal measurement type that provides a text-based measurement.</td>
<td>Goal Plans Business Goals</td>
<td>Measurement</td>
</tr>
<tr>
<td>Quantitative</td>
<td>Goal measurement type that provides fields to enter a specific target to be achieved.</td>
<td>Goal Plans Business Goals</td>
<td>Measurement</td>
</tr>
<tr>
<td>Rating</td>
<td>Slider bar that indicates the evaluation of the achievement of the goal given by the manager. Note that when an employee is viewing his own goal, the manager's rating is not visible to the employee and the</td>
<td>Goal Plans Rating</td>
<td></td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Applicable to</td>
<td>Header</td>
</tr>
<tr>
<td>---------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>--------------------------------</td>
<td>------------</td>
</tr>
<tr>
<td>Rating</td>
<td>Rating bar is designed for the employee to provide his own rating.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rating</td>
<td>Title of the section that shows the rating information about the goal.</td>
<td>Goal Plans</td>
<td>Rating</td>
</tr>
<tr>
<td>Related Goals</td>
<td>Title of the section that lists all the goals</td>
<td>Goal Plans</td>
<td>Related Goals</td>
</tr>
<tr>
<td>Show/Hide Line of Sight</td>
<td>Button that shows or hides the goal alignment hierarchy.</td>
<td>Goal Plans</td>
<td>Alignment</td>
</tr>
<tr>
<td>Specifications</td>
<td>Title of the section that contains other identification information about the goal.</td>
<td>Goal Plans</td>
<td>Specifications</td>
</tr>
<tr>
<td>Start Date</td>
<td>Indicates the date when the achievement of the goal starts and from when the progression is being calculated.</td>
<td>Goal Plans Business Goals</td>
<td>Specifications</td>
</tr>
<tr>
<td>Status</td>
<td>Status drop-down menu of the employee goal, which can be Not Started, In Progress, Completed and Canceled.</td>
<td>Goal Plans Business Goals</td>
<td>General</td>
</tr>
<tr>
<td>Stretch Value</td>
<td>Quantitative measurement field that indicates the stretch value for a goal, which could exceed the set Target Value, expressed as a number with or without decimals. Note that this value is not used to calculate the completed percentage.</td>
<td>Goal Plans Business Goals</td>
<td>Measurement</td>
</tr>
<tr>
<td>Target Value</td>
<td>Quantitative measurement field that indicates the level of achievement set for the goal, expressed as a number with or without decimals. The Progress percentage is determined according to the Actual Value over the Target Value.</td>
<td>Goal Plans Business Goals</td>
<td>Measurement</td>
</tr>
<tr>
<td>Weight</td>
<td>Field that indicates a weight for the goal. Goal weights are entered as whole numbers 0-99. The system automatically calculates the number into a percentage and both are displayed. Weights can be carried over to the performance review when goals are copied from the plan to the review.</td>
<td>Goal Plans</td>
<td>Rating</td>
</tr>
</tbody>
</table>
Working with Business Goals

Business Goals

Business Goals are qualitative or quantitative statements of an organization's intent or objectives, for example, “Increase operational efficiency 5%.”

If you have Business Goal rights, you can create goals for the organization that you are a member of or for subordinate organizations.

All goals have a goal period, a “container” that typically mirrors the time period in which the organization evaluates employees. During this period, you work at achieving your goals and in most case you are expected to attain the goals within the period. A goal can, however, span multiple periods.

The Business Goals feature provides three modes: a list of goals, a goal “vCard” that allows for the rapid updating of progress, and a Gantt timeline of goal start and end dates. The Gantt view supports drag and drop functionality with regard to the goal start and end date adjustments. If you “hover” your (mouse) pointer over a goal in Gantt mode, a summary of the goal alignment, dates and progress is displayed. You can access goal details by double-clicking the goal from any of the three modes.

A business goal can be either quantitative or qualitative. In a qualitative goal, you provide a text-based measurement. For example, a goal such as “Increase employee visibility into corporate plans”, the measurement could include a description of training programs to be held and other strategies. In short, a goal does not have a detailed measurement by which success can be measured. Progress is manually entered for qualitative goals.

In a quantitative goal, you enter a specific target to be achieved. For example, in a goal such as “Reduce employee voluntary turnover by 5%”, the target is 5%. To measure progress, you must also enter a value. The variance is a percentage calculation of progress based on the actual value divided by the target value.

Goal Creation through Alignment

The creation of employee or business goals though alignment provides users with an intuitive way to rapidly create goals that are in line with the key objectives of the organization or with their manager’s goals and to tailor them to specific needs.

This goal creation option provides the ability to create goals in the way that many businesses work (via top-down alignment or cascading). Rather than requiring users to create goals from scratch, the creation through alignment offers the ability to select another business or employee goal and to use that goal as a “template” for creating the new goal. Key details are copied from the selected goal and the new goal is automatically aligned to the goal that was selected. The user can then personalize the goal to satisfy different objectives.

Creating goals via alignment is offered as an alternative to creating goals from scratch. Therefore, when creating a new business or employee goal, the user is prompted to select whether to create the goal from scratch or to create it through goal alignment. If users selects the latter, they are provided with a dialog box allowing them to choose which business or employee goals they want to align to.

When the new goal is created from alignment to a another goal, the following information is automatically entered and can be edited if needed.

- Name of the goal
- Description of the goal
- Start and due dates
- Alignment to the goal that was selected to create the current goal
Printable Business Goal Plan

A PDF version of the business goal plan is offered to provide a printable version of all the business goals of a business organization for a given period. The printout can show all the information about all the business goals in the plan or only some goal information.

The printable version of the business goals is available by simply clicking on the Print button.

Print options are available to specify which information is to be shown on the printout - Goal Details are always printed.

Fields that show no values will not be displayed on the printout version of the business goal plan.

<table>
<thead>
<tr>
<th>Print Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal Details</td>
<td>Always shows the name and the description of the goal (whether it be a goal, sub-goal, business project and milestone when the Business Projects and/or Related Goals print options are also selected) as well as its start and due dates, status, organization and criticality level.</td>
</tr>
<tr>
<td>Measurement</td>
<td>Shows the actual, target and stretch values of the progress of the goal, the progress percentage as well as any specified measurement text.</td>
</tr>
<tr>
<td>Alignment</td>
<td>Shows the theme the business goal is aligned to.</td>
</tr>
<tr>
<td>Business Projects</td>
<td>Shows the business projects related to each business goal in the plan.</td>
</tr>
<tr>
<td>Related Goals</td>
<td>Shows the other business goals that are related to the business goal.</td>
</tr>
</tbody>
</table>

Creating a Business Goal

Creating a business goal provides the ability to create and define business goals to which you can later align the business projects of your organization.

**Prerequisite**

To be able to create business goals, and to have the Business Goals link under the Quick Links, you must have a Business Goal Administrator user type.

**Performance > [Quick Links] Business Goals**

**Steps**

1. If a business goal has never been created for the selected organization and business period, click Create to create the goal plan. Note that the Create button only appears the first time a plan is created.
2. In the Business Goals page, click .
3. In the Create a new goal window, specify whether you want to create a goal by alignment or from scratch, that is manually.
   - If you selected Create a new goal through alignment, click Next to select the goal to align to.
   - If you selected Create manually, click Next to enter basic information about the goal.
4. Click OK to create the goal and to display the goal detail page in order to enter further goal information.
5. Click when complete.

**Result**
The new business goal is displayed on the *Business Goals* page.

**Next Step**
You can edit the business goal or align it with other business goals, if not already aligned.

### Creating a Business Sub-goal

You can create business sub-goals and have them aligned to your business goals.

**Prerequisite**
You can only create a business sub-goal for an existing business goal.

**Performance > [Quick Links] Business Goals**

**Steps**

1. In the *Business Goals* page, select the goal for which you want to create a sub-goal and click to select *Add Business Subgoal*.
2. In the *Create a new goal* window, enter the basic information about the new sub-goal.
3. Click *OK* to display the goal detail page.
4. Provide extra information as required and click when complete.

**Result**
The new business sub-goal is automatically aligned to the parent business goal and is displayed under the parent goal on the *Business Goals* page.

### Editing a Business Goal or Sub-goal

Editing a business goal or sub-goal allows you to make corrections to or update the item.

**Prerequisite**

**Performance > [Quick Links] Business Goals**

**Steps**

1. In the *Business Goals* page, click the goal or sub-goal that you want to edit.
2. In the goal detail page, make your changes to the goal or sub-goal.
3. Click .

**Result**
Your changes are saved.

### Aligning a Business Goal

You can align a business goal to a theme.

**Prerequisite**

**Performance > [Quick Links] Business Goals**
Steps
1. In the Business Goals page, select the goal that you want to align.
2. In the goal detail page, scroll to the Alignment section and click Align....
3. In the Alignment window, select the category of the item you wish to align the goal to and select the desired item from the list of corresponding goals or themes.
4. Click OK to perform the alignment and return to the goal detail page.

Result
The goal is now aligned with the selected item.
A hierarchal view of the goal alignment is displayed in the Alignment section.

Realigning a Business Goal
You can realign a business goal to a different goal or simply clear the alignment association.

Prerequisite
Performance > [Quick Links] Business Goals

Steps
1. In the Business Goals page, select the goal that you want to realign.
2. In the goal detail page, scroll to the Alignment section and click Clear to remove the existing alignment.
3. You need to click before proceeding to the new alignment.
4. Click Align...
5. In the Alignment window, select the category of the item you wish to align the goal to and select the desired item from the list of corresponding goals or themes.
6. Click OK to perform the alignment and return to the goal detail page.

Result
The goal is now aligned with the new item.
A hierarchal view of the goal alignment is displayed in the Alignment section.

Creating a Business Project from the My Projects Page
Creating a business project from the My Projects page provides you with the opportunity to assign a project owner and assign goals directly to employees working on the project. A project can be created and later aligned to a business goal or created for another project, where it becomes a sub-project.

Prerequisite
Performance > [Quick Links] My Projects

Steps
1. In the My Projects page,
   • click to create a first-level project, to later align, or
   • select the project for which you want to create a sub-project and click to select Add Business Project....
2. In the Create a new business project window, enter the basic information about the new project.
3. Click **OK** to create the business project and to display the project detail page in order to enter further information.

**Result**

The new business project is created and added to the list of projects in *My Projects* page. If the project was created under another project, it will be automatically aligned to the parent project and will be displayed by clicking the arrow next to the project.

**Next Step**

You can perform other tasks such as creating another project or a milestone for an existing project.

---

**Creating a Business Project from the Business Goals Page**

Creating a business project from the Business Goals page offers you the opportunity to assign a project owner and assign goals directly to employees working on the project.

**Prerequisite**

**Performance > [Quick Links] Business Goals**

**Steps**

1. In the *Business Goals* page, select the goal for which you want to create a project and click ▶ to select *Add Business Project*…
2. In the *Create a new business project* window, enter the basic information about the new project.
3. Click **OK** to create the business project and to display the project detail page in order to enter further information.

**Result**

The new business project is added as a project, under the selected goal in the *Business Goals* page.

Note that when the project is created from a business goal, the project is automatically aligned to the business goal that was selected.

---

**Creating a Business Sub-project**

Creating a business sub-project is used to assign a project owner and assign goals directly to employees working on the project. Sub-projects can be created for business goals or any other projects.

**Prerequisite**

**Performance > [Quick Links] My Projects**

**Performance > [Quick Links] Business Goals**

**Steps**

1. In the *My Projects* or *Business Goals* page, select the item for which you want to create a sub-project and click ▶ to select *Add Business Project*…
2. In the *Create a new business project* window, enter the basic information about the new project.
3. Click **OK** to create the business project and to display the project detail page in order to enter further information.

**Result**

When a project is created for a business goal or another project, the alignment to the parent item is automatic.
Aligning a Project or Sub-project

You can align a project to sub-project or to a business goal.

**Prerequisite**

*Performance > [Quick Links] My Projects*

*Performance > [Quick Links] Business Goals*

**Steps**

1. In the *My Projects* or *Business Goals* page, select the business project you want to align.
2. In the business project detail page, scroll to the *Alignment* section and click *Align*.
3. In the *Alignment* window, select the category of the item you wish to align the project to and select the desired item from the list of corresponding items.
4. Click *OK* to perform the alignment and return to the project detail page.

**Result**

Your project is aligned to the selected item.

Creating a Milestone

Creating a milestone creates an element that marks the completion of a specific work package or phase. You can create milestones for business projects.

**Prerequisite**

A project or sub-project need to be created before you can create a milestone and add it.

*Performance > [Quick Links] My Projects*

**Steps**

1. In the *My Projects* page, select the project for which you want to create a milestone and click *Add Business Milestone*.
2. In the *Create a new milestone* window, enter the basic information about the new milestone.
3. Click OK to create the milestone.

**Result**

The new milestone is displayed below the project or sub-project.
HR Administrators Working with Employee Goal Plans

Viewing an Employee Goal Plan

Viewing an employee goal plan allows an HR administrator to access an employee goal plan that is pending, whether the approval has not yet been requested or the approval is in progress or has been rejected.

**Prerequisite**

*Performance > [HR Administration Tools] Goal Plan*

**Steps**

1. Filter the goal plans in order to view the desired goal plan.
2. In the result grid, click the name of the corresponding employee.

**Result**

The *Goal Plan* page displays and shows the goals associated to the selected employee.
Getting Started with Performance Management

Performance Review

A performance review is a formal record of an employee's development and performance for a specific time period. Typically, it involves a review of an employee's performance and achievements during the most recent period and the creation of a plan of action for the next period.

The performance review can include a review of goals, competencies and custom sections as defined by the organization. Custom sections can include items such as key performance indicators, development activities, survey questions, accomplishments, etc. The performance review is routed through a configurable workflow and approval cycles such that the final review becomes part of the employee's permanent employment record.

Rating

A rating is an evaluation of an employee's result or progress regarding a goal, competency or any custom item presented in the performance review. Both the employee and the manager can provide a rating but only the manager's rating is used to calculate the overall rating of the review.

When the review form is configured by the system administrator, a rating model is defined for the overall rating of the review. A rating model is associated with each review definition and can be specific for each section and item within each section or be the same throughout the entire review form.

Users select a rating model from the list of predefined rating models, which are part of the Foundation Data needed to define a review definition.

The overall rating is composed of three elements and can be configured to be displayed or hidden. In the Taleo Performance user interface, an overall rating is available on the Summary of the review as well as on the Summary of each review section. When all components as set to be displayed, the overall rating is presented as follows:

Overall Rating  Hide Detailed Rating  Solid Performance 3 2.83

1. First, the text value of the rating - which is always displayed when the Show Overall Rating is selected = Solid Performance
2. Then, as the second component, the numerical value of the rating, as defined in the rating model - which can be configured to be shown or hidden with the Show Overall Rating as Numerical Value setting = 3
3. And lastly, the calculated value of the rating - which can be configured to be shown or hidden with the Show Overall Rating Value setting = 2.83

The overall rating is calculated based on the ratings and weights of each of the sections after rounding.

Review Rating Rounding Mechanism

The configuration of the review rating calculation provides two different threshold values, one for the decimal rounding and the other for the final rating value, both defined as part of the review definition and review sections.

Each threshold field is expressed as a percentage and once entered, provides dynamic examples of the possible ratings.
The Decimal Rounding Threshold is used to determine how the calculated average of all item ratings in a section and the calculated average of all section ratings will be rounded. The Rounding Interval Examples illustrate a sample result of the selected threshold for one single interval, according to the number of decimals specified.

The decimal rounding threshold process is a purely mathematical operation and in most cases, the threshold will not require any adjustment from the default value of 50%. Indeed, this value essentially corresponds to rounding up or down at the .5 limit – which is what almost every single computerized system in the world does by default. The possible configuration change that could occur for this calculation would be in the number of decimals used. Since the decimal rounding step is purely based on the raw average, the examples provided in the Rounding Interval Examples are independent of the chosen rating model.

The Rating Value Selection Threshold defines a completely different step in the process, the one of selecting the appropriate discrete business specific rating. In this case, it is common for customers to adapt the threshold (typically upwards) to meet their specific situation. For this part of the process, the rounded value mathematically calculated in the previous step is used as the input to determine which discrete rating value is appropriate, based on the numerical value associated to this value. As opposed to the examples given for the decimal rounding threshold, the Rating Value Selection Intervals shown are dependent on the associated rating model and on the number of decimals, but not on the Decimal Rounding Threshold itself.

Following are some examples to illustrate the possible rounding processes.

Example:

Let's take a review that includes three competencies that are rated 2, 3 and 4. The calculated average here is simple: (2+3+4)/3=3. The assumption being that all competencies are equally weighted and are all using the same rating model, which is established as follows:

- 1 for Poor
- 2 for Average
- 3 for Good
- 4 for Very Good
- 5 for Excellent

In another example, slightly different, we have three competencies that are rated 3, 4 and 4: (3+4+4) / 3 = 3.666666666666666 is the raw (unrounded) average.

To determine the rounded average, the calculation will take into consideration the number of decimals and the decimal rounding threshold value. With the typical Decimal Rounding Threshold of 50%, the rounded average would be:

- Number of decimals = 2: 3.666666666666666 becomes 3.67
- Number of decimals = 1: 3.666666666666666 becomes 3.7
- Number of decimals = 0: 3.666666666666666 becomes 4

Although it would be a very unusual implementation, using a configuration where the Number of Decimals = 1 and the Decimal Rounding Threshold = 75%, the raw average above would become 3.8 (since 3.666666666666666 would be below the threshold of 3.75.

Once the rounded average has been established for items in a section and then for sections within a review, the system needs to calculate the final overall rating, which is also based on a threshold value. The Rating Value Selection Threshold value is used to determine the final rating that corresponds to the calculated rounded average.

In our example, this second threshold would determine whether the 3.7 rounded average result in a final rating of Good or Very Good.

- With a 50% rating value selection threshold, the cut off is at 3.5, so 3.7 rounds to 4 for Very Good
- However, with a 80% rating value selection threshold, the cut off is at 3.8, so 3.7 is lower so it rounds to 3 for Good
• This is the common case, as some companies do not want employees to “squeeze” into the 'Very Good' category with just barely a little more than a 'Good'/Very Good' average.

In summary, the Decimal Rounding Threshold determines how the raw rating average is rounded to the specified number of decimals and the Rating Value Selection Threshold determines how that average is translated back to a rating of the original rating model.

Employee and Manager Collaboration

This feature entitles the employee, upon appropriate configuration, to have access to the performance review itself, and not to a separate self-assessment, therefore having the possibility to edit the review and collaborate with the manager until the review is completed.

The employee can collaborate with the manager in the review writing process when both the Review Contribution and the Allow employee collaboration in the main review settings are enabled. When these settings are enabled, the employee and manager share the same form, providing no distinction between a self-assessment and the manager assessment. When both the manager and the employee write in the main review, a setting indicates which is assigned the review first. The two can then send the review form back and forth to one another.

When both the employee and the manager participate in the review process, and in the same review, it is important to note that only the person who currently has the authorship may edit the review. If the review is currently assigned to the employee, the manager cannot edit the review. He will need to take the authorship back from the employee before editing. This is possible only when the employee sends the review back to the manager.

In contrast, if you prefer the employee to complete a separate self-assessment, the setting to activate is Allow employee collaboration in the main review.

Review - Goal Plan Synchronization

This enables you to keep goal and review information in sync during the initial stages of the review process, until the employee submits their self-assessment or the manager submits their review feedback.

It is not always possible for an employee's goal plan to be finalized in time for the start of the performance review process; also, subsequent changes to a review can still impact the information contained in a goal plan. Review-Goal Synchronization provides the ability to ensure the details are synchronized between the two.

When items are synched, an icon is displayed in the list of goal-related review items. This indicates that any modifications made to their content will automatically be updated in any item that has a reference to it, and vice versa.

Before a performance review is submitted, the following actions are synched:

<table>
<thead>
<tr>
<th>Synched Actions</th>
<th>Performance Review to Goal Plan</th>
<th>Goal Plan to Performance Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Add or edit goals and competency goals*</td>
<td>• Create, edit, or delete goals and competency goals</td>
<td></td>
</tr>
<tr>
<td>• Edit or delete sub-goals and competency sub-goals</td>
<td>• Create, edit, or delete sub-goals and competency sub-goals</td>
<td></td>
</tr>
<tr>
<td>• Create, edit, or delete tasks</td>
<td>• Create, edit, or delete tasks</td>
<td></td>
</tr>
</tbody>
</table>

*Since the main goal element must already exist in the system you cannot create a new one within the review and have it synch back to the goal plan. Custom goals can be created within the review, but they will not be.
Synched Actions

<table>
<thead>
<tr>
<th>Performance Review to Goal Plan</th>
<th>Goal Plan to Performance Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>synched back to the goal plan. Deleting goals in a review only deletes them in the review, they will remain in the goal plan.</td>
<td></td>
</tr>
</tbody>
</table>

Once a performance review self-assessment is submitted by an employee or the manager submits their employee evaluation, the review items and goal items are no longer synched.

In the case that a review is restarted, the goals that existed in the review before the review was restarted will not be in synch with goals in the goal plan. However, after the review has been restarted, the user can add new goals to the review from the goal plan(s). These newly added goals will be in synch with the goals in the respective goal plan(s) until the review is re-submitted. In other words, when new goals are added to a restarted review, it is possible for a user to have a mix of goals that are in synch with the goal plan and those that are not, within the same review.

⚠️ Review comments are not synched.

Technical Overview

If Review-Goal Synchronization is enabled, when the performance reviews are initially created from the goal plans, the review items are linked to the goal items. The goal items are the master version and the main, parent record in the system, as the review items - while separate objects in the system - maintain a reference to the goal items. When a change is made to a review item (listed above) and saved, it updates the goal item record. At the point where the employee self-assessment or manager evaluation are submitted, the information from the goal item is copied over to the review item and references from the review items to the goal items are severed. From this point onward, the items are completely separate objects.

Calibrating Performance Reviews

Review calibration allows groups of employees to be compared and calibrated against one another in order to ensure consistency in review ratings.

Calibration is a two step process that enables higher level managers to calibrate the performance ratings of their organization's employee reviews and for those reviews to be subsequently revised to better reflect the calibrated ratings. An HR Admin user who is designated as a calibration owner for a specific performance review, will launch the calibration process, enabling an employee’s initial performance review rating to be adjusted.

While a calibration owner is explicitly assigned to a review request, calibrators are not nominated and do not have tasks assigned to them. Once the calibration owner launches the calibration process, it should be done in a collaborative manner amongst high level managers and key stakeholders, making specific system tasks unnecessary. Once calibration is complete; however, tasks are sent — as typically occurs during the review process — for revising the comments for calibrated reviews.

🔍 Per existing functionality, calibration can only be performed on populations of up to 1000 employees at a time.
Chart Mode

The chart mode is available to the performance review and talent pool pages to provide the ability to quickly understand summary level information about a population being analyzed. Charts can be used for updating employee metrics, review ratings, and calibration.

The chart mode consists in a bar chart that is configured by the client. Each chart can depict the population being analyzed on a particular metric such as an employee’s potential or review rating. The user can view the details of each segment (the people) to further analyze and manage the group. Each bar can be viewed in detail, to see additional metrics for each individual in that bar.

The chart mode can give access to multiple charts, depending on the charts that were made available when configuring the related template.

In the context of performance review management, charts are mainly used for analytics and to perform calibration. Calibration is done at the detail level, where each individuals in a bar is displayed in a list and can be dragged and dropped into a different bar.

The chart provides various information. First, at the top, you get information about the chart as a whole:

- Group Average - Indicates the average value for the metric associated with the current chart for the rated population. If there is an overridden value for the metric it is used in the calculation, otherwise the original value associated with the employee is used.
- Company Average - Indicates the average value for the metric associated with the current chart for the entire company. This is all employees, including those not part of the total population.
- Total Population - Indicates the number of individuals in the chart, including rated and unrated population.
- Unrated Population - Indicates the number of individuals in the chart that are not rated on the metric being analyzed and therefore not included in a bar.

Then, in the chart itself, information is provided for each bar of the chart, if so configured. Following are the possible statistics that can be displayed:

- Count - Indicates the number of individuals in chart when hovering.
- Distribution - Provides the percentage corresponding to the number of individuals in the bar over the number of individuals in the chart (the unrated population is not taken into account in the distribution percentage).
- Benchmark - Provides the expected distribution (as a percentage) for each bar of the chart. The benchmark is also represented by a line on the chart.
- Deviation - Indicates how far the current distribution is from reaching the benchmark. The deviation is a calculation of the current distribution versus the benchmark, based on the number of individuals in the chart (total population). It indicates how many individuals must be removed (when deviation is positive) or added (when deviation is negative) to comply with the benchmark.

Review Auto Saving

An autosave feature is offered for reviews so that review information is automatically saved at regular time intervals to prevent loss of information in case of application time out or when the user navigates between review items.

When the autosave feature is enabled, the system performs an automatic save of the review information after the defined period of inactivity or at a fixed interval, depending of the selected autosave type. In addition, a time stamp label has been added at the top of the review window to inform the user of the time of the last automatic save.

When enabled by the system administrator, this feature is enabled for all users.
Even when the autosave feature is enabled, users always have the ability to manually save reviews by clicking ...

**Offline Reviews**

Authorized users are able to download their reviews to work on them locally and upload them directly back into Performance Management.

For some customers without reliable internet connectivity, or that may share a computer, or for the manager that would like to work on reviews from the plane, completing Performance Reviews online is not always possible or convenient. Managers, HR Administrators, collaborators and employees with the appropriate review edit permissions are able to:

- Locally download their own or their employees' Performance Reviews.
- Modify the downloaded Performance Review providing ratings and comments.
- Comments and Ratings are the only editable values in the offline review.
- Save modifications locally at any time and complete the review in phases.
- Upload the completed reviews back up into Taleo Performance Management.

Important considerations when using Offline Reviews:

- Offline Reviews must be enabled in the Configuration.
- The review must be in **Draft** status to use offline.
- Adobe 11 or higher must be installed; the offline review is a PDF. Microsoft Word or Excel are not supported.
- Users cannot choose which sections to download.

  The configuration options that are enabled for the online review are duplicated in the offline review; there is one set of configuration settings.
- History is not supported.
- Summary grids are not supported.
- Batch processing of offline reviews is not supported; one review at a time may be downloaded or uploaded.
- No calculations are performed in the offline review.

**Accessing Upload and Download Features**

The Download Review and Upload Review options are only displayed if the logged in user has permission to manage reviews. These authorized users can use the Actions menu to download and upload Performance Reviews.

Additionally, managers can use the Contextual menu in the Review Hub to download and upload reviews.
Rating Calculations

The configuration options chosen for the online review are duplicated in the offline review. This is especially important in understanding how rating calculations function when downloading and uploading reviews. If a user is able to manually override calculated scores in the online review, they will be able to do so in the offline review. However, no calculations are performed in the offline review! Ratings are recalculated at the time of upload only. Overall Rating Auto-Calculated and Allow to Override Overall Rating are the two rating configurations that are key in how the ratings calculations behave between the online and offline reviews.

<table>
<thead>
<tr>
<th>Settings</th>
<th>Navigation</th>
</tr>
</thead>
</table>

Download and Upload with a Summary Rating Already Calculated

If a user downloads an online review with a summary rating that already has a calculated value, it will display in the offline review as follows:
If a user changes any of the item or section ratings in the offline review, the summary ratings in the offline review will not be calculated. However, upon upload, the summary ratings will be recalculated and updated to account for any changes to the item or section ratings that were made in the offline review. The overridden values will be flagged, as indicated by the exclamation point icon.

**Download and Upload with a Summary Rating Manually Set**

If a user downloads an online review with a summary rating that already has a manually (overridden) set value, it will display in the offline review as follows:

![Image of a review with a manually set rating](image)

If the user does not change the value in the offline review, when uploaded, this manually set (overridden) value will be maintained and flagged as an overridden value in the online review.

**Upload with No Value Set for the Summary Rating**

If the user erases a summary rating value and leaves it blank in the offline review, when uploaded, the system will automatically calculate the value and enter the newly calculated rating in the online review.

**Messaging**

<table>
<thead>
<tr>
<th>Process/Action</th>
<th>Message</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attempting to upload a file type other than a PDF</td>
<td>Error. &quot;The file cannot be opened. It can be corrupt or in an improper format.&quot;</td>
<td>Only the PDF file format is supported. If the file format is not recognized (anything other than PDF) the file cannot and will not be uploaded.</td>
</tr>
<tr>
<td>Attempting to upload a review PDF, but for the incorrect employee</td>
<td>Error. &quot;The file you uploaded does not match with employee and review request selected. Please verify the employee and the review request.&quot;</td>
<td>Validations are performed on employee ID and review ID to verify that the correct review for the correct employee is being uploaded. PDFs are unique per employee review. You cannot change employee name or employee information on the PDF.</td>
</tr>
<tr>
<td>Date check</td>
<td>Warning. &quot;A more recent update to this review occurred on [[last review date + hour]]. The review</td>
<td>The dates of when both the online review and the offline review were last modified are compared with each other. If it's the case that a modification to the online review that's dated</td>
</tr>
<tr>
<td>Process/Action</td>
<td>Message</td>
<td>Details</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>document you are importing was last modified on ([last form update + hour]) and will overwrite the current version. Do you wish to continue?&quot;</td>
<td>after the date of the last modification to the offline review, users are warned that uploading the offline review will overwrite the current version of the online review.</td>
<td></td>
</tr>
<tr>
<td>Fields not found</td>
<td>Warning.</td>
<td>It may be the case that a goal, for example, was removed on the online review while work was being done on the offline review. Because items cannot be removed from the offline review, when the review is uploaded, the system will reconcile this change by warning the user that some fields have changed on the online review.</td>
</tr>
<tr>
<td>Confirmation before saving upload</td>
<td>Warning.  &quot;You are about to update the review request ([review request name]) for ([employee name]) with the selected offline review. Do you wish to continue?&quot;</td>
<td>This is a reminder to the user prior to uploading the offline review, that the rating values and comments that exist on the online review will be overwritten with the values on the offline review upon uploading.</td>
</tr>
<tr>
<td>Network or unexpected error</td>
<td>Error.</td>
<td></td>
</tr>
<tr>
<td>File validation</td>
<td>File Validation.</td>
<td>This displays once a user selects Upload.</td>
</tr>
<tr>
<td>Review upload</td>
<td>Review upload.</td>
<td>This displays once a file is validated and while the review is being uploaded.</td>
</tr>
<tr>
<td>Upload completed</td>
<td>Upload completed.</td>
<td>Once the review upload process completes successfully, this message is displayed.</td>
</tr>
</tbody>
</table>

**Configuration**

- Adobe 11 or higher must be used for the Offline Reviews feature to render properly and as expected.

  🌟 Browser settings and Adobe versioning determine where and how the PDF reviews are saved and rendered.

- There is a company setting in the Administration pages to enable offline reviews. This is a private setting; only Support users are able to view and edit this.

<table>
<thead>
<tr>
<th>Type Permission</th>
<th>Name</th>
<th>Location</th>
</tr>
</thead>
</table>

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**Downloading an Offline Review**

Downloading a Performance Review allows authorized users to access and edit reviews offline in a PDF format.

- **Prerequisite**
  - The Performance Review must be in *Draft* status to download the review offline. The user must have proper permissions to be able to download the review; if not, the download and upload menu options will not display.

- **Steps**
  1. Select Performance Review to be downloaded.
  2. From the Actions menu, select Download Review.
  3. Save the PDF to a location of your choice.

- **Result**
  - The Performance Review is now available offline in a PDF format and ready for editing.

**Uploading an Offline Review**

Uploading a Performance Review allows authorized users to upload reviews that have been edited offline. At the time of upload, changes made offline are updated and recalculation performed when applicable.

- **Prerequisite**
  - The user must have proper permissions to be able to upload the review; if not, the download and upload menu options will not display.

- **Steps**
  1. Select Performance Review to be uploaded.
  2. From the Actions menu, select Upload Review.
  3. Browse to the PDF to be uploaded back into Performance Management and click Upload.
  4. Read the confirmation message and click Confirm when satisfied this is the correct review and action.

- **Result**
  - The latest version of the Performance Review, including offline edits, is in the Performance Management application.

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Working with Performance Reviews

Performance Review Management View

When performance reviews are accessed via the Manager Center links, the user is presented with a list of reviews, which offers a new management view that can be used to display a specific group of reviews and to take action upon multiple reviews at once if needed.

The management view of performance reviews is similar to the view offered to administrators in the HR Administrator Tools, but with different filters. This view is only available when reviews are accessed via the Manager Center for users who have the appropriate user type permission.

This management view is the solution for managers who need to have access to aggregated review information on employees they are responsible for. Instead of working on each individual employee review, the management view allows the user to have an overall appreciation of the review process and perform review related actions or tasks (individually or in batch).

The performance review management view is the starting point to perform calibration of reviews.

The performance review management view also offers a filter panel with various fields and metrics available to user. This allows the user to narrow down the displayed reviews according to a desired criteria. The user can then reduce the scope of employee reviews he has access to and view the resulting reviews in any of the views offered - list, matrix or chart. The list view is displayed by default. As for the matrix and chart views, their availability depends on whether the performance review template has been configured to include these views or not.

The actions that can be performed depend on the user's user type permissions and the permissions granted upon review configuration.

Filtering Reviews

Performance review filters are divided into Basic filters and Advanced filters that enable managers and HR Administrators in the Performance Hub to focus on a specific set of employees, who they can subsequently perform batch actions on or calibrate their reviews.

**Basic Filters** - Are unique to reviews and include Review Cycle, Review Request, Include Direct Reports, People, and Review Steps.

**Advanced filters** - Are found in different modules and the filters that are available will vary depending on which modules are enabled in your implementation.

**Default Logic for the Review Cycle and Review Request Filters.**

When a manager or higher-level manager opens the Performance Review page from the Manager Center the following processing logic occurs:

1. The My Direct Reports option is selected by default.
2. This generates a list of review items for employees who are the direct reports to the login user.
3. Based on the list of employees, the system figures out what is the latest review cycle and populates the value in the Review Cycle filter.
4. Based on the latest review cycle, the system figures out what is the latest review request and populates the Review Request filter.

Example:

Manager A has three direct reports: Employee 1, Employee 2 and Employee 3, where:
• Employee 1’s latest review cycle is 2011 and review request is Marketing Review.
• Employee 2’s latest review cycle is 2012 and review request is R+D Review, May/2012
• Employee 3’s latest review cycle is 2012 and review request is Sales Review, Sep/2012

When Manager A logs in and opens the Performance Review module they will see “2012” showing under “Review Cycle”; “Sales Review” under “Review Request”; and the list of employees will show Employee 3.

Performance Review Filters

A - Review Cycle and Review Request are preloaded by default. Unlike some of the others, these filters must always have values selected, which is why one of the values is Not Set. The options available in the Review Steps filter are dependent on these values. When the Review Cycle filter is set to Not Set the Review Request filter options are disabled. Once the Review Request is set to anything other than Not Set, the Review Steps are disabled.

B - Exclude my direct reports is set to No by default. Setting it to Yes is useful when working with your direct reports to calibrate their employees if you do not want them to see their ratings.

C - People provides the ability to see all employees in your organization, your direct reports, or specific employees and their direct reports. By default My direct reports is selected and they are displayed in the list. Up to eight direct reports are displayed by default in the filters. You can display up to sixteen direct reports by selecting Show More and collapse it back to the default view by selecting Show Less. When you select a direct report, they and all employees under them are displayed in the list. Selecting Other will display that employee and everyone within that persons part of the organization. You must always select one of these filter options, regardless of any other selected filters, including the advanced filters. If you clear the People filters and click refresh, the My organization filter option is automatically applied.

D - Review Steps filters enable you to display only those employees who are currently at a specific step in the performance review workflow. The available steps are related to the chosen Review Request. Selecting a step will display users with Employee Review Statuses of the previously completed step. For instance, selecting Revision Step displays employees with a status of Calibrated and selecting Writing Step displays employees with at Draft status.

E - Show advanced filters displays the configurable filters, which are used in different modules throughout the system. The Employees section in advanced filters no longer has the currently logged in user populating the Manager filter, by default.

If there are more than 1000 reviews, the first 1000 are displayed and you will subsequently need to refine your filters to see the remaining reviews.

To Filter Performance Reviews

Prerequisite

Performance > [Manager Center] Performance Review

Steps

1. In the Filters panel of the Performance Reviews page, select the filters that will allow you to show the desired reviews.
• Click to launch the search and refresh the results.
• Make sure to clear the existing filter values by clicking otherwise the previous filters will be selected by default.

2. If the number of reviews listed is too large, you can reduce the number of results by further refining the filters and repeating the previous step.

   In such a case, do not click so that the second set of filters is applied to the previous result.

**Result**

The reviews listed should correspond to the filtering options you have specified.

**Next Step**

From the list of review, you can perform various batch actions, calibrate review ratings or employee metrics or just view the reviews in a different mode.

**Review Completion Indicator (Bubble)**

The review completion bubbles and their corresponding hover text, Rating and Comment, in the Performance Review Overview area reflect how the review item has been configured. This provides a visual cue as to whether items in the Performance Review are mandatory and whether they are complete.

The indicator behavior logic is based upon whether comments or ratings are available in the review item. For example, if only ratings are available in the review item, the review completion indicator will show that item is complete once the rating has been entered. The bubble always reflects whether there are still items, ratings or comments, left to complete. The hover text reflects what has been completed, and what is required.

Mandatory information is flagged with an asterisk * while optional information is not.

The following image shows an example of the Review Completion Bubble completely unfilled, meaning that both rating and comments are enabled and neither are completed. Additionally, the hover text shows that comments are mandatory.
This next image shows an example of the Review Completion Bubble half filled, meaning that both Rating and Comments are enabled and one of the two is complete. Additionally, the hover text shows that Rating is complete, indicated by the green check mark. Neither Rating or Comments are mandatory as there is not an asterisk next to either.

The following image shows the various Review Completion Bubble and hover text combinations.
Completing a Self-Assessment

Completing a self-assessment allows you to evaluate your own performance. Aspects of the self-assessment, such as when it is assigned to you are configured in the review's workflow.

**Prerequisite**

You can complete a self-assessment if one has been assigned to you and is displayed in My Tasks.

**Steps**

1. In My Tasks, from the Show list select Self-Assessment.
2. From the Tasks list, select the relevant item.
3. From the Summary window, select Performance Review.
4. The Overview section of the review is displayed.
5. Click **Access the review** to go to the section summary and begin filling out your self-assessment.
6. Read through the entire review and in the Sections segment of the form select the items that require self assessment.
7. In your information section for an item, under the Weight field use the rating bar to select the appropriate value.
8. If comments about your rating are required or desired, double-click the Comments field and enter your text.
   
   If you are uncertain about the text to enter, you can use the Writing Assistant from the Toolbox to obtain a list of existing texts. These texts can often guide you in providing appropriate comments. The Writing Assistant is only available if the related setting has been activated for employees.
9. Make sure to click **to save your ratings**.
10. Depending on the review's workflow configuration, your manager may be able to add additional items to your review, which are indicated with a plus icon. You must select the item and click Add to ensure it is included in your performance review.
11. If you are required to release the review to the manager, click Complete Write Self-Assessment and enter any additional comments and click OK.

Note that whenever a review is closed, by you or automatically, you can no longer edit it.

Result
If you completed the task successfully, a message to that effect is displayed. When the self-assessment is complete, your tasks in the Workflow tab display the following symbol: ☑️

Sending a Review Back to an Employee

A manager might need to send a review back to an employee when, for example, the employee's self-assessment is incomplete or the employee wants to change some ratings. This task can only be performed on one review at a time.

Prerequisite
Managers must be allowed to restart the review workflow for this review request. The review must have been completed and submitted by the employee, but not yet submitted by the manager.

Steps
1. Find and open the desired performance review.
2. In the Performance Review, from the Actions pull-down list, select Send Review Back to Employee.

Result
The review will be sent back to the employee and will be reset to a Draft status.

Approving an Employee's Performance Review

If a performance review workflow includes an approval process, the approvers specified in the review request can verify and approve or reject the manager's performance review of the employee and the employee's self-assessment (provided the latter is also part of the workflow).

Prerequisite
Someone specified you as an approver in a review request.

Steps
1. Select the review you want to approve in Taleo Performance or via email:
   - Filter My Tasks, by selecting Employee Performance Review, choose one of the submit for approval tasks, and then select Performance Review from the Summary Information panel.
   - Open the approval email and click the link for the performance review. If you are in a single sign-on (SSO) environment you will go directly to the review, otherwise you will need to login to Taleo Performance before being directed to the review.
2. In the Performance Review, the Overview section of the review is displayed.
3. Read through the entire review and verify the provided ratings and comments.
Calibrating Reviews

Calibrating reviews involves launching the calibration phase, performing calibration on employees, revising comments on calibrated reviews, and ending the calibration phase.

Calibration occurs after the draft step of a performance review, when managers and employees have completed their assessments, but before the review progresses to the approval or release step.

Launching Calibration

The calibration owner of the review request for the reviews to be calibrated, is responsible for launching the calibration process.

Once an acceptable number of reviews have successfully passed through the writing step of the review workflow, the calibration owner can launch calibration and move reviews to the calibration step. Typically the calibration owner will meet with key stakeholders and calibrators to confirm the company's review process has progressed far enough to begin calibration.

Launch Calibration is only available in the Performance Hub when the logged in user is the calibration owner of the selected Review Request, and there are employees associated with that request who have not been progressed to the calibration step.

When calibration is launched, all reviews in the draft step will be moved to the calibration step, whether the manager has submitted them or not.

Calibration Rating Lock

During calibration, the entire review is locked and calibration rating changes are tracked in the Review History.

A review under calibration is only editable by a Calibrator. Review authors are not able to make any changes to the review during calibration. After a review is submitted, it is locked to all review authors. During the Calibration phase of the review process, only Calibrators are able to modify the calibrated section ratings. During the Revise phase of the review process, all the calibrated section ratings remain locked, but non-calibrated section ratings, item ratings and comments are open to review authors.

Calibration Flags

Calibration flags denote whether a rating is calibrated with or without change. These flags apply to any Calibration section and to the Review Overall Rating. Any of the following three flags can be seen in the Review Summary section and in the Overall Rating section, depending on the review workflow step:

- Overridden value
- Calibrated with Change

- Calibrated without Change

**Calibration Events History Tracking**

The Review History tracks all of the events related to the overall and section ratings. Any event that involves a change to a section rating used for Calibration or to the Overall Rating is recorded in the Review History. The following events are tracked in the Review History:

- Review Section Rating Assigned
- Review Overall Rating Assigned
- Review Section Rating Changed
- Review Overall Rating Changed

<table>
<thead>
<tr>
<th>Date and Time</th>
<th>Event</th>
<th>Details</th>
<th>By</th>
</tr>
</thead>
<tbody>
<tr>
<td>May 24, 2013, 9:32:10 AM</td>
<td>Review Created</td>
<td>The review has been created.</td>
<td>System User</td>
</tr>
<tr>
<td>May 24, 2013, 9:32:54 AM</td>
<td>Review Assigned</td>
<td>The review has been assigned.</td>
<td>System User</td>
</tr>
<tr>
<td>May 24, 2013, 9:45:25 AM</td>
<td>Review Section Rating Assigned</td>
<td>The review section rating for Competency section is set to 3.</td>
<td>Jonathan Coleman</td>
</tr>
<tr>
<td>May 24, 2013, 9:45:25 AM</td>
<td>Review Overall Rating Assigned</td>
<td>The review section rating for Goal section is set to 4.</td>
<td>Jonathan Coleman</td>
</tr>
<tr>
<td>May 24, 2013, 9:45:50 AM</td>
<td>Review Overall Rating Assigned</td>
<td>The review overall rating is set to 3.67.</td>
<td>Michelle Campbell</td>
</tr>
<tr>
<td>May 24, 2013, 9:45:50 AM</td>
<td>Review Section Rating Assigned</td>
<td>The review section rating for Custom section is set to 4.</td>
<td>Michelle Campbell</td>
</tr>
<tr>
<td>May 24, 2013, 9:47:39 AM</td>
<td>Review Submitted</td>
<td>The review has been submitted.</td>
<td>Michelle Campbell</td>
</tr>
<tr>
<td>May 24, 2013, 9:47:20 AM</td>
<td>Review Under Calibration</td>
<td>The review is under calibration.</td>
<td>System User</td>
</tr>
<tr>
<td>May 24, 2013, 9:49:58 AM</td>
<td>Review Section Rating Changed</td>
<td>The review section rating for Custom section has been changed from 4 to 5.</td>
<td>Katy Durnak</td>
</tr>
<tr>
<td>May 24, 2013, 9:51:21 AM</td>
<td>Review Overall Rating Changed</td>
<td>The review overall rating has been changed from 2.67 to 1.</td>
<td>HR Admin (All PM)</td>
</tr>
<tr>
<td>May 24, 2013, 9:55:55 AM</td>
<td>Review Calibrated</td>
<td>The review has been calibrated.</td>
<td>Katy Durnak</td>
</tr>
<tr>
<td>May 24, 2013, 9:56:15 AM</td>
<td>Review Revised</td>
<td>The review has been revised.</td>
<td>Katy Durnak</td>
</tr>
<tr>
<td>May 24, 2013, 9:56:35 AM</td>
<td>Review Under Approval</td>
<td>The review is under approval.</td>
<td>Katy Durnak</td>
</tr>
<tr>
<td>May 24, 2013, 9:56:35 AM</td>
<td>Review Section Rating Changed</td>
<td>The review section rating for Custom section has been changed from 5 to 2.</td>
<td>Katy Durnak</td>
</tr>
<tr>
<td>May 24, 2013, 9:56:53 AM</td>
<td>Review Section Rating Changed</td>
<td>The review section rating for Competency section has been changed from 3 to 5.</td>
<td>Katy Durnak</td>
</tr>
</tbody>
</table>

The calibration flags are not supported in print.

**To launch calibration**

**Prerequisite**

You must be the calibration owner for the review request and it must have the Calibration step in its workflow.
Steps

1. Select the Review Cycle and Review Request you want to calibrate and click .

   It is possible that no employees are displayed. This does not prevent launching calibration.

2. Click Launch Calibration.

   A message is displayed indicating how many employees will be moved from the writing step to the calibration step.

3. Click OK.

   A message is displayed indicating you can see the progress of the action from Show Process History.

Result

All of the employees associated with the review request are moved to the Calibration step.

Next Step

High level managers of those employees can now begin calibrating their reviews.

Performing Calibration

Once calibration has been launched, calibration owners and high level managers can use charts in the Performance Hub to calibrate employees.

Only charts which use Employee - Review Rating, Employee - Goal Rating, or Employee - Competency Rating can be used for calibration. Which of the three your company uses will depend on your implementation.

When you show bar details you can see the employees and the metrics that have been included with the chart, to better judge where they should be placed in the chart.

Calibration can be done for individual employees by selecting a Current Review Rating and Current Section Rating value in the list. To calibrate up to twenty employees at once, you can select them from the list and drag and drop them into a bar column.

To perform calibration

Prerequisite

HR Administrator must have launched calibration.

Must be a higher-level manager to calibrate reviews.

Steps

1. Select the Review Cycle and Review Request you want to calibrate and other criteria to focus on the employees you want to calibrate and click .

2. Select the required charts from the Charts list.

   There can one or more charts required for calibration, depending on the number of sections in the review requiring calibration. There needs to be a separate chart for each rating being calibrated.

3. Select the employees from the list and drag and drop up to twenty of them in the appropriate chart bar.

   or
From the current rating column, select the rating from the list for individual employees. Both the bar chart and the current rating column are updated accordingly.

**Result**

Each review section rating requiring calibration now has an overridden rating and when viewing the list of employees associated with the review in the list in the Performance Hub, their status is indicated as *Calibrated*.

**Next Step**

The reviews can now be revised by the direct manager and the employee and subsequently the calibration owner can end the calibration process.

---

**Ending Calibration**

Once employees' review scores have been calibrated, the performance reviews can progress to the Revision step. Calibration can be ended using one of two options: Finish Calibration or Complete Calibration. Finish Calibration is a batch action that takes all employee reviews associated with the review request and moves them to the Revision step. Finish Calibration is a batch action available to the calibration owner from the Performance Hub, that moves all employees associated with a review request to the Revision step. Complete Calibration is available to HR Administrators and calibration owners, who can select specific employees to move to the next step.

When finishing or completing calibration you must ensure that each employee has been given a calibrated rating for each section of the review used for calibration.

Once the calibration phase is over, employees and managers can finish writing reviews that were still in draft stage, when calibration was launched. The Employee Review Status is indicated as Calibrated and the employee's direct managers will then receive tasks for completing the revision process.

During the revision process, managers can add comments to any items; however, ratings that were used for calibration are locked down and displayed in read only. Sections and items that were not used for calibration can still have their ratings changed. Once revisions are done they have a status of Revised, the reviews can be progressed to the next stage of the workflow, such as Approve or Release.

---

**To end calibration**

**Prerequisite**

You must be the calibration owner for the review request and it must have the Calibration step in its workflow.

*Performance > [Manager Center] Performance Reviews > etc.*

**Steps**

1. Select the **Review Cycle** and **Review Request** you want to end calibration and click .

   It is possible that no employees are displayed. This does not prevent launching calibration.

2. Click **Finish Calibration**.

   A message is displayed indicating how many employees will be moved from the calibration step to the complete revision step.

3. Click **OK**.

   A message is displayed indicating you can see the progress of the action from *Show Process History*. 


Result
The reviews have been moved to the next step in the review workflow, which will be either Release or Approve.

Adjusting a Review During its Approval
Adjusting a review during its approval allows an HR administrator to make changes to the review.

Prerequisite
For an HR administrator to be entitled to edit a review, the calibrator settings granting those permissions must be active.

HR Administration Tools > Performance Review

Steps
1. Select the filters that will display the desired review.
2. In the result grid, click the name of the employee whose review you want to adjust.
3. Once the Performance Review page is displayed, go to the section of the review to be edited and make the desired change.
   
   If edits are not possible, this means that you have not been granted with calibrator rights.
4. If Taleo Performance is configured to run a Language Check, it can be selected from the Actions menu.
   The language contained within free text fields of the review can be checked manually for inappropriate phrases.
5. Once all changes made, click Save.

Result
The performance review will show the changes made.

Requesting Additional Ratings
Requesting additional ratings from other raters is similar to requesting feedback for a goal, competency or custom item: the purpose is to help you better evaluate an employee's performance. The ratings the raters provide are included in the review.

Prerequisite
The Request Multi-Rater setting must be selected in the review request. The Request Multi-Rater feature is then available for selection in the Actions menu.

Steps
1. Open the performance review for which you want other people to submit ratings.
2. In the Actions menu, click Request Multi-Rater.
3. In the Request Feedback window, click To... to select a recipient for your feedback request.
4. Click the calendar icon and then click the due date.
5. To change the priority, click the current priority value and then click a new value from the list.
6. Check the check box next to the items for which you want feedback.
7. As needed, enter a comment or edit the default one (if one is provided), and format the text with the available editing options.
8. Click Send Request.

**Result**

The recipients receive a feedback request in My Tasks. As recipients provide a rating for each of the requested items and send the feedback, the ratings and any comments the raters might have included are displayed in your Feedback panel of the review and in the review form.

**Collaborators Participating in Review Writing**

When an employee is designated as a review collaborator by an employee’s manager, that employee can participate in the review writing process.

Users who manage reviews can now have other employees collaborating in the review writing process by making them collaborators. Compared to review raters, who mainly provide comments via feedback requests (not part of the review itself), review collaborators are entitled to enter comments right into the review form.

To be entitled to participate and edit a review, users other than the employee and the employee’s manager must be made collaborators, even matrix managers.

Therefore, for matrix management purposes, matrix managers must also be review collaborators. Depending on when the matrix management relationship was established, there are two possibilities:

- If the matrix management relationship was created prior to review generation, the system automatically makes the matrix manager a collaborator.
- If the matrix management relationship was created after review generation, the system does not automatically make the matrix manager a collaborator. The user has to manually add the matrix manager as a collaborator.

When the system is about to generate reviews according to the review definition, review cycles, and review request configurations, it proceeds as follows:

- The system creates the reviews.
- For each review, the system assigns the employee and manager author of the review.
- The system verifies if there are matrix managers for the selected employee.
- If the system finds that matrix managers currently have access to the employee, the system designates those matrix managers as collaborators of the review.
- The system completes the creation of the review.
- The system updates the security relationships for this new employee review. Collaborators have ownership on the review as the manager author and the employee do. Matrix managers have matrix management access.

When a review has multiple participants, which could be the primary manager and collaborators, all users can work simultaneously on the review. However, it is the first user who saves that will have his changes saved. The second user who attempts to save will be prompted with a message informing him that the review has been updated by another user and that he needs to refresh the review before making/saving his changes.

Review collaborators can be added or removed via the Manage Review Collaborators action.

**Task Assignment**

When a collaborator is added to a review and asked to participate in the review writing process, he gets informed of the tasks to perform via his Task List. Two tasks can be assigned:

- Write Employee Review - when the review is still in a Draft status and not yet submitted for approval and also when the review has been resent to the employee and reset to Draft by the manager
- Reopen for Approval - when the review has been rejected and resent to the manager.

The task is assigned when the review is generated and collaborators are already present, or when collaborators are later manually added to the review.
Following is a table listing all the actions that can be performed by matrix managers versus those allowed to review collaborators.

<table>
<thead>
<tr>
<th>Task or Action</th>
<th>Tasks that can be done by a collaborator</th>
<th>Tasks that can be done by a matrix manager*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Write Employee Review (initial, rejected or restarted review)</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Submit for Approval</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Reopen for Approval</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Decide on Approval</td>
<td>No</td>
<td>No (unless the matrix manager is defined as an approver in the review workflow or the original approver has delegated his tasks to this matrix manager)</td>
</tr>
<tr>
<td>Release Employee Review</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Request Acknowledgment</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Acknowledgment</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Send Review Back to Employee</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Cancel Review</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Transfer Review</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Manager Review Collaborators</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Notified of task 'Write Employee Review' or 'Reopen for Approval' via Task List</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Notified of task 'Submit for Approval', 'Release', 'Request Acknowledgment' or 'Close' via Task List</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Note that if a matrix relationship is created before review generation, the matrix manager is automatically added as a review collaborator and therefore be able to perform the tasks allowed to collaborators.
To Add a Review Collaborator

A review collaborator is added by an employee's manager so that person can participate in the writing process of the review.

**Prerequisite**

**Performance > [Quick Links] My Performance Review**

**Performance > [Manager Center] Performance Review**

**Steps**

1. Open the performance review you want to add collaborators to.
2. From the *Actions* menu, select *Manage Review Collaborators*.
3. In the *Manage Review Collaborators* window, click +.
4. In the *People Selector* window:
   a) Select the search options required to find the desired people.
   b) Select the desired collaborators in the *Search Results* box.
   c) Click ➪ to add them to the *Selection* box.
   d) If you want to automatically add the direct reports of the selected persons, check the *Include Direct Reports* option.
   e) Click *Select*.
5. Back to the *Manage Review Collaborators* window, click *OK*.

**Result**

The collaborator will be informed of the task to do via the Task List.

To Remove a Review Collaborator

A review collaborator is removed by an employee's manager so that person can no longer participate in the writing process of the review.

**Prerequisite**

**Performance > [Quick Links] My Performance Review**

**Performance > [Manager Center] Performance Review**

**Steps**

1. Open the performance review from which you want to remove one or multiple collaborators.
2. From the *Actions* list, select *Manage Review Collaborators*.
3. In the *Manage Review Collaborators* window, select the collaborators to remove by checking the related checkbox and click ✗.
4. Click *OK* to close the window and return to the performance review.

Comparing Review Information

A manager can compare competencies, summary section ratings, items that were configured to be part of a custom section and overall ratings for different groups of employees.
Prerequisite
Only managers can perform comparisons when they are completing an employee's performance review.

Steps
1. Open the performance review of the employee you want to compare to other employees.
2. From TOC select the item to be compared, such a goal or competency.
3. Click Compare and additional information and options are displayed.
4. Specify the group of employees to which you want to compare the current employee.
5. As needed, click the desired Include option.

Result
The list of employees to whom the current employee is compared and the ratings that correspond to the selected item are displayed.
Performance Review Administration

Printable Performance Review

A PDF version of an employee's performance review is offered to provide a printable version of the review for a given period. The printout can show all sections or specific ones and can be printed as a form to be completed.

The printable version is offered to users to print their own performance review or the reviews of their direct reports, if applicable, by simply clicking on .

Print options are available to allow the user to choose the sections and information to print and provides an option to display the printed review as a form to be manually completed. When the setting Display empty rating and comment fields is selected, the review is printed with blank spaces for comments and ratings.

By default, all review sections are selected to be printed, except for the History section. The item name, description, rating and comments are always included and cannot be excluded from the printed review. However, the other information is optional.

The sections offered to be printed are presented in the same order as in the review itself. Also, depending on the review's configuration and settings, some sections might not be displayed as not part of the review. The following table lists the review settings related to each possible section to be displayed.

<table>
<thead>
<tr>
<th>Printable Section or Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview section</td>
<td>Section that is always offered as a print option as there is related setting.</td>
</tr>
<tr>
<td>Overall Summary section</td>
<td>Print option that is only offered if the <strong>Show Summary</strong> setting in the Review Definition configuration is active.</td>
</tr>
<tr>
<td>History section</td>
<td>Print option that is only offered if the <strong>Allow to View History Section</strong> setting by rater type in the Review Definition configuration is active.</td>
</tr>
<tr>
<td>Name of each section in the review</td>
<td>All sections other than Overview, Overall Summary and History that are included in the review are shown as print options and be selected to be printed or not.</td>
</tr>
<tr>
<td>Item name, description, rating and comments</td>
<td>For each item in the review, the name, description, rating and related comments are always printed.</td>
</tr>
<tr>
<td>Instructions option</td>
<td>Print option that is always offered as there is not related setting.</td>
</tr>
<tr>
<td>Feedback option</td>
<td>Print option that is always offered as there is not related setting.</td>
</tr>
<tr>
<td>Additional Information option</td>
<td>Print option that is always offered as there is not related setting.</td>
</tr>
<tr>
<td>Summary Section Grid option</td>
<td>Print option that is always offered as there is not related setting.</td>
</tr>
<tr>
<td>Display empty rating and comments fields</td>
<td>Print option that provides the ability to print the review as a form to be manually completed, with empty spaces for entering the ratings and comments.</td>
</tr>
</tbody>
</table>
The PDF version of the review provides the following printing possibilities:

- Includes the company logo
- Includes the page numbers
- Provides the ability to print a short version of the review, with only the following:
  - Item name
  - Item definition
  - Item rating
  - Item comments
- Provides the ability to select the review sections to be printed.
- Provides the ability to display the review as a form to allow the user to enter ratings and comments directly on the printed version.

**To Print a Performance Review**

Printing a performance review can be performed for any performance review and at any point in time. The printed version of the review shows all the information contained in the review, except if the print format has been configured to hide the review instructions, rating models and/or summary lists. The information shown reflects the review at its current workflow step.

**Prerequisite**

To see a print preview of a performance review and print the review, Adobe Acrobat Reader must be installed on your computer.

**Steps**

1. Open the performance review you want to print and click .
2. In the Print Options window, select the sections and the information that you want to include in the printed review.
   - If you want to print the review in order to complete it in writing, make sure you select *Display empty rating and comment fields*.
3. Click Print.
4. Acrobat Reader opens and displays the performance review as a PDF file. To print the review, click the “printer” icon in Acrobat Reader.

**Result**

Acrobat Reader prints the performance review. While the review is displayed, you can perform any of the functions available in Acrobat Reader.

**Automatic Reminders**

The configuration capability to set up automatic reminders allows users to set up reminders for each review action within a given workflow defined for performance reviews. System Administrators can set review process reminders at any or all of the individual review step/action levels. Whereas notifications are triggered by workflow events and are static, reminders are configurable and provide the ability to send users emails to promote task accomplishment. The reminders contain deep linking and allow the employees to go directly into their performance reviews from within the email.

**Example:**

The performance review cycle for the current year has been configured and assigned to all employees within an organization. Notification emails have been sent to all the employees once the writing self-assessment tasks
have been assigned. Reminder emails have been configured at a bi-weekly occurrence starting from the date the self-assessment task have been assigned, with reminders ceasing once the tasks have been completed. Julia receives an email notification stating that her review self-assessment is due by March 31, 2013. Julia clicks the link contained within the reminder email that brings her directly to her review self-assessment. She works for a couple hours on her self-assessment, but then needs to move on to another task. Julia gets brought onto a new project and completely forgets about completing her performance review. Because the reminder emails have been configured to be sent bi-weekly, Julia receives an email reminder again containing the link to her performance review. She completes her self-assessment just in time for her one-on-one with her manager. Because Julia has completed her tasks, the email reminders cease.

In the case that a review is transferred, the review reminders will be sent out to the new employee and conversely the reminders to the previous employees will cease. When a review request or review cycle is duplicated, all the information is copied, which includes notifications and reminders.

Managing Goal Information in Performance Reviews

As goal plans provide the foundation for performance reviews, you can view and sometimes edit goal items from the review.

To Manage Goals within a Performance Review

Managing goals within a performance review involves creating and adding new goals to be evaluated in a performance review, and editing or deleting existing ones.

Prerequisite

The necessary permissions must have been granted when the corresponding review section was configured. Furthermore, because the permissions to add (or create), edit and delete goals are granted separately, you might be able to perform some tasks but not others.

Steps

1. Open the performance review whose goals you want to manage.
2. From the TOC, click the name of the relevant goal section.
3. From the Review tab for the section, click Manage Section Items.
4. The Manage Goals Section window is displayed and you can perform any of the following steps.
   - To create a new goal, click Create.
   - To add a new goal, click Add.
   - To delete a goal, click \[\text{[.]}\].
   - To edit a goal, click \[\text{[.]}\].

If you are adding a new goal, a selector page opens. You can select the new goal from the list displayed.

If you are creating a new goal, a creation page opens. Enter the information requested on the page.

If you are deleting a goal, a message asks you to confirm the deletion.

If you are editing a goal, an editing page opens in which you can make your changes.

5. Click Done (this step is not applicable if you are deleting a goal).

Result

Your changes are displayed in the relevant goal section.
To Manage Competencies within a Performance Review

Managing competencies within a performance review is confined to adding competencies to a performance review or removing competencies from a review.

**Prerequisite**

The necessary permissions must have been granted when the review section was configured. Furthermore, since the permissions to add and remove are granted separately, you might have the permission required to perform one task and not the other.

Note that competencies cannot be created or edited.

**Steps**

1. Open the performance review for which you want to manage competencies.
2. From the TOC, click the name of the relevant competencies section.
3. From the Review tab for the section, click Manage Section Items.
4. The Competencies Section window is displayed, click Add to add a new competency or click to remove a competency.
   
   If you are adding a new competency, you can select one or more competencies using the Competency Selector.
   
   If you are removing a competency, a message will ask you to confirm the deletion.
5. If you selected a competency in the previous step, click Done.

**Result**

The change is reflected in the corresponding competency section.

To Manage Custom Items within a Performance Review

Managing custom items within a performance review involves the creation of new custom items to be evaluated in a performance review, or editing or delete existing custom items.

**Prerequisite**

The necessary permissions must have been granted when the review section was configured. Furthermore, since the permissions to add (or create), edit and delete are granted separately, you might have the permissions to perform some tasks but not others.

Note that even if you are granted the permission to add items, you can only create new custom items, not add some from a list of existing items.

**Steps**

1. Open the performance review whose custom items you want to manage.
2. From the TOC, click the name of the relevant custom section.
3. From the Review tab for the custom section, click Manage Section Items.
4. In the Manage Custom Section window you can perform any of the following steps.
   
   • To create a new item, click Create. On the creation page that opens, enter the information requested and click Done.
   • To add a new item, click Add.
• To delete an item, click 🗑️. You will then need to confirm the deletion.

• To edit an item, click ✏️. In the editor page, make the desired changes and click Done.

**Result**
The change made is reflected in the relevant custom section.

---

### To View Goal Feedback in a Review

Feedback provided on a goal that is part of a performance review can be seen directly in the review.

**Prerequisite**
Goals need to be set to be populated into the reviews for the related feedback to be displayed.

*Taleo Performance > Performance Review*

**Steps**

1. Open a performance review.
2. Click 🗑️ to expand the Tools panel.
3. Click Feedback to open the corresponding panel.
4. In the TOC, click the item for which you want to view feedback that might have been provided.
   
   Note that if no feedback has been provided, you might want to request feedback by clicking 🗑️.

5. If there is feedback, it is displayed in the Feedback panel along with the name and job title of the person who provided the feedback, the date of the feedback, the rating given (if any), and comments (if any).
   
   • To view the entire content of the feedback, double-click the feedback text in the Feedback panel.

   Close the Feedback window when you are finished consulting the feedback.
   
   If desired, you can ask for more feedback, as in step 4.
6. To close the Feedback panel, click the Hide Tools link.

---

### To View the Alignment of a Goal in a Performance Review

Viewing the alignment of a goal that is part of a performance review, you can see (from within the performance review) the organizational efforts that support the goal.

**Prerequisite**
To view the alignment of a goal, the related review section setting must be activated for the link to be displayed. Furthermore, the goal must have been auto-populated in the review from the employee's goal plan and not created dynamically in the review itself.

**Steps**

1. Open a performance review.
2. From the TOC, select a goal to display it in the Review tab.
3. Scroll to the Alignment section to view the details.

**Result**
If applicable, the alignment of the goal is displayed and hovering over the items will provide more information.
Review Analytics

The Review Analytics option of the HR Administrator Tools panel allow HR administrators to view statistics on review cycles, review requests, review statuses, reviews and review generation errors.

When selecting the Review Analytics option from the HR Administration Tools panel, the first page to be displayed is the Review Cycle Analytics page, which shows a list of all the review requests in the selected review cycle, along with the number of reviews and errors in each. Then, clicking on a given number of reviews or on a given number of errors opens the related page, either the Performance Reviews or the Review Generation Errors page.

- **Review Cycle Analytics** - This is the default view displayed when selecting Review Analytics from the HR Administration Tools panel, which lists the review requests that are part of the review cycle specified in the filter. By default, the review cycle selected is the first one in the alphabetical list of all existing review cycles in the system. This view gives access to all other views.

- **Review Request Analytics by Status** - This view shows the distribution of review statuses and the number of reviews in each for the review request selected from the Review Cycle Analytics page. Clicking on the hyperlinked count of reviews displays the corresponding reviews.

- **Review Request Analytics by Rating** - This view shows the distribution of review overall ratings and the number of reviews in each for the review request selected from the Review Cycle Analytics page. Clicking on the hyperlinked count of reviews displays the corresponding reviews.

- **Performance Reviews** - This view lists the employees for which a performance review is in the status selected from the Review Request Analytics page. Clicking on an employee's name from that page opens the entire employee's performance review.

- **Review Generation Errors** - This view lists the error messages that were generated for the review request selected from the Review Cycle Analytics page. Clicking on the name of an employee opens a window showing details about the error, such as the error date and the error stack. From the detail page, all error details can easily be copied to the Clipboard in a single click and then pasted in any desired output.

All views provide various filters to refine the information.

**Benefits**

- Provides robust functionality for HR administrators to analyze performance reviews that have been assigned to troubleshoot any potential issues and functions.
- Acts much like a report.
- Allow customers to investigate and pro-actively repair errors.

**To View Review Cycle Analytics**

Viewing review cycle analytics allows an HR administrator to view, for a given review cycle, a list of the associated review requests, as well as the number of reviews and errors each review request contains.

**Prerequisite**

*HR Administration Tools > Review Analytics*

**Steps**

1. From the filter panel, select the review cycle associated to the desired review request.
   
   Use the Clear or Refresh buttons to either remove all selected filters or to launch a search with new filters.

2. From the Review Request column, select the Action menu and then Show Statuses for the required review request name, to see the distribution of reviews by statuses.
By default, the selected filter corresponds to the first review request in the alphabetical list of all existing review cycles in the system. This view gives access to all other views.

**To View Review Request Analytics**

Viewing review request analytics allows an HR administrator to view the distribution of reviews in a given review request either by review statuses or by review ratings, along with the number of reviews for each status or rating. Clicking on the hyperlinked count of reviews displays the corresponding reviews.

**Prerequisite**

*HR Administration Tools > Review Analytics*

**Steps**

1. From the filter panel, select the review cycle associated to the desired review request.
   
   User the Clear or Refresh buttons to either remove all selected filters or to launch a search with new filters.

2. In the result grid of the Review Cycle Analytics page, open the review request drop-down menu to select whether to display reviews by statuses or by ratings.

3. In the result grid of the Review Request Analytics by Status or by Rating page, click on a given number of review to see the related reviews.

**To View Review Generation Errors**

Viewing review generation errors allows an HR administrator to view a list of error messages that were generated for a given review request.

**Prerequisite**

*HR Administration Tools > Review Analytics*

**Steps**

1. From the filter panel, select the review cycle associated to the desired review request.
   
   User the Clear or Refresh buttons to either remove all selected filters or to launch a search with new filters.

2. In the result grid of the Review Cycle Analytics page, click the number in the Errors column associated to the desired review request.

3. In the result grid of the Generation Errors page, click on the name of the employee to see details about the error, such as the error date and the error stack.

4. From the detail window, all error details can easily be copied to the Clipboard in a single click and then pasted in any desired output.

5. Close the detail window.

**Review Transfer**

A review transfer can be performed by a manager or by an HR administrator when an employee changes job, when a manager is unavailable to perform a review or when a review is sent to a delegate.

When a review is transferred, both the review form and the review process are kept intact (with the exceptions of the actual authorship change) - all items that had been added, edited or deleted are preserved. The only things that can be cleared are the manager ratings and comments, depending on the company setting Delete Manager's
Ratings And Comments On Transfer. This setting offers the possibility to always or never delete ratings and comments or to ask the user what should be done at the time of transfer. However, if the manager's review of the employee is completed, this setting is ignored and the manager entries are preserved.

Feedback requests can also be canceled when a review is transferred, based on the company setting Cancel Pending Multi-Rater Requests On Transfer. If there are any outstanding feedback on multi-rater requests from the manager at the time the review is transferred, they can be canceled. Any feedback gathered by the previous manager will not be accessible/viewable by the new manager.

It is important to know that an employee review cannot be transferred if it has been CLOSED or CANCELLED. If such a transfer is attempted, an error message indicating why the transfer could not be performed will be displayed.

Example:

If the current task in the workflow process of the review is assigned to the “current manager”, in the transfer, it will be reassigned to the new manager/author and any subsequent tasks for the “current manager” will be assigned to the new manager/author. (Note: The new author is not required to be the new manager of the employee.)

To Transfer a Performance Review

Transferring a performance review allows managers and HR administrators to transfer an employee's review to another manager.

Prerequisite

The review request must be configured to allow transfers. Reviews that are closed or canceled cannot be transferred.

Steps

1. Open or select the checkbox beside the performance review you want to transfer.
   - If you are a manager, access the review via the Manager Center.
   - If you are an HR administrator, access the review via the HR Administration Tools - Performance Review.
2. Click Transfer Review from the Actions menu.
3. In the Transfer Review window, select the employee to whom you want to transfer the review.
4. If the value of the Delete Manager's Ratings And Comments On Transfer and/or Cancel Pending Multi-Rater Requests On Transfer product settings was set to Ask user, you will need to specify what is your preference by selecting the desired options. If however, the value of these settings is set to either Always or Never, a message will be displayed to inform you of the actions that will be performed upon transfer of the review.

Result

A new task is displayed in the task list of the manager to whom the performance review was transferred. The performance review status is set to Draft.

Language Check

A language check for free-text fields scans for inappropriate, discriminatory, or offensive text within employee reviews.

Language Check is a tool to search free text fields in a review for words that would be considered inappropriate. Free text fields to be scanned include, comments at overall, section, or item levels. For each word or phrase found
in a Language Check Dictionary, a warning message displays to users enabling, but not requiring, modification to
the text and automatically saving the change.

Language Check can be initiated in the following ways:

<table>
<thead>
<tr>
<th>Scan Method</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatic</td>
<td>At review submission, the manager is prompted to run Language Check. Free text fields can be modified.</td>
</tr>
<tr>
<td>Manually</td>
<td>Can be run by managers or others within the approval chain. If scan is available to users who cannot edit the review, the scan wizard is read only.</td>
</tr>
</tbody>
</table>

The Language Check Dictionary can be updated through Taleo Connect Client (TCC). The content of
the dictionary can be exported using TCC. Organizations can then modify the content, outside of Taleo
applications. Once imported through TCC, the new content will be available in the application. This feature
allows organizations to add words and phrases to existing categories, add and modify new categories, or change
the suggested text.

The Language Check feature does not guarantee or ensure that no legal action will be brought against
an organization as a result of an employee's review. It is a tool to reduce risk.

Example:

A well-meaning manager adds an overall comment to an employee review that says, "Jane is well liked in her
department. She has become a mother figure to the entire group." This statement could be considered gender
and age biased. The Language Check wizard would stop on the word "mother" because it was defined in the
dictionary as a trigger. The wizard would suggest removing the word "mother" and possibly replacing the
phrase with wording that indicated the employee was respected.

**Progressing the Review Workflow**

HR administrators can intervene and move reviews from one status to another.

If for some reason a review cannot be progressed along the review workflow by the manager and the employee,
an HR administrator can complete batch actions and restart review workflows when necessary.

**Review Batch Actions**

When performance reviews are accessed via the Manager Center or via the HR Administration Tools, it is
possible to view a group of reviews and to act upon them in batch.

Review actions that can be performed individually on a single review can also be performed in batch via the
performance review list view, where filters provide the ability to find a specific group of reviews requiring
action.

The way the batch process is performed is slightly different depending on the way the selection is done.

- **Selection of more than one review (but not all reviews)** - The action menu offers all possible actions that
  may be taken on the selected reviews. When this option is selected, the user has the ability to enter a comment
  that applies to all transactions that are processed. The batch history will confirm if all transactions passed or if
  the action failed on any item.

- **Selection of all reviews** - If the user chooses to select all reviews, the application prompts if the action should
  be conducted on all reviews displayed on the page or on all reviews that meet the filter criteria - It then
displays the results of the action in the batch history.
A batch action can be performed on a maximum of 1000 reviews. If the results of the review selection exceed 1000, a message prompts the user to refine his search to reduce the number of results.

When a user selects a large population, it is possible that the selected reviews are in different status (draft, submitted for approval, ready to be released, etc.). The batch actions that are available in the menu are the ones that can be performed on any reviews selected on the page.

The review actions that can be performed in batch depend on the viewing mode.

**List view**

- **All review workflow actions** - All steps included in the workflow process definition can be completed in batch, except for the completion of the self-assessment, which can only be performed by the employee. The possible actions include: Write Employee Review, Release, Request Acknowledgment, Acknowledge, Complete Revision, Launch Calibration, Finish Calibration, Complete Calibration, Submit for Approval, Approve, Reject and Close. The selected action will apply to only those reviews that are in the appropriate step of the review workflow. For example, a manager can only write an employee's review for reviews that are in draft. Furthermore, the user must be the task assignee to perform the review workflow action - so this user can be the main task participant, a matrix manager for which he has been delegated tasks, or an HR administrator. These batch actions are also available via the HR Administration Tools.
- **Decide on Approval** - From the list view, it is possible to decide on the approval of the selected reviews. The user must be the task assignee to complete the action. Therefore, if the user does not have an approval task request, the action will not be available.
- **Transfer** - The selected reviews can be transferred to another user.
- **Cancel** - The selected reviews can be canceled.

**Matrix view** (only available when accessed via the Manager Center)

- Shows total and unrated population.
- Update Metrics - After moving employees from one cell to another, the changes made to the over-ridable employee metrics can be saved as the true metric values.
- Show Details - This action opens another window that displays the detailed information available for the cell.

**Chart view** (only available when accessed via the Manager Center)

- Shows total and unrated population, as well as the organization and chart average.
- Show Details - This action opens another window that displays the detailed information available for the bar. Double-clicking on the bar also opens the bar details.

Updating metrics, performing calibration, and viewing unrated individuals are performed at the bar detail level; however, calibration can also be completed from the main chart level and you are not required to drill-down.

**Review Workflow Restart**

This feature provides the ability to revert the review process back to draft step so that the employee and/or the manager may change a review after it has been submitted.

The ability to restart the review workflow process is available to the manager author of the review and to HR administrators. When the review process is set back to a draft status, all comments, ratings and any information entered previously by the users are maintained.

For the manager, the action is called ‘Send Review Back to Employee’. When this action has been allowed to managers in the review request, this action is available to the manager before completing the employee's review, that is when the employee has completed and submitted the self-assessment. For managers, this means that they will be able to send a review back to an employee in case the review comments, ratings or any information is inadequate.
For the HR administrator, the action is called ‘Reset Review to Draft’. This action is always available for administrators when accessing the HR Administrative Tools and can be performed at any workflow step of the review, except when the review is in draft. When this action is performed, the review is set back to the writing step for both the manager and the employee. For HR administrators, this feature provides the ability to reset the review to a draft status, for both the manager and the employee, so that they can revise the review content. With this feature, HR administrators are also able to open a closed review to revise its ratings or comments in case the ratings get challenged or to address a legal issue.

HR Admin users can send a Closed review back to draft, but they cannot send a Canceled review back to draft.

Whether performed by a manager or an HR administrator, the due date of a review step is adjusted automatically if the due date was configured to be a period of time, that is due in a given number of days. However, the due date is not adjusted if the step's due date is configured as a fixed date.

Example:
An employee has completed and submitted his self-assessment. His manager has received the self-assessment but finds that the employee has not provided enough details and explanations to justify his ratings. The manager decides to send the review back to the employee so he can provide the missing information. The employee gets a new notification to write his self-assessment. He will then have to fill in the missing information and submit his self-assessment again. Since the time granted to write the self-assessment was a period of time (3 days) and not by a fixed date, the due date for writing the self-assessment will be adjusted accordingly, based on the current date; if the due date had been a specific date, no updates would have been done.

To Cancel a Performance Review
Canceling a performance review allows an HR administrator to cancel an employee's performance review.

Prerequisite
HR administrators are entitled to cancel a review at any time.

HR Administration Tools > Performance Review

Steps
1. Filter the approval requests in order to view the desired review.
2. In the list, click next to the name of the corresponding employee to open the Actions menu and select Cancel Review.
3. When asked to confirm the cancellation, click OK.

A message window will be displayed to indicate whether the action was performed successfully.

Result
Once canceled, the performance review shows a Canceled status.

To Force the Completion of a Task
Forcing the completion of a task allows an HR administrator to force a performance review to proceed to the next step in the process.

Prerequisite
HR Administration Tools > Performance Review
Steps
1. Filter the approval requests in order to view the desired review.
2. In the list, click ▶ next to the name of the corresponding employee to open the Actions menu and select Complete (name of the current task).
3. In the task related window, enter a comment if needed and click OK.
   A message window will be displayed to indicate whether the action was performed successfully.

Result
Once the current step completed, the performance review proceeds to the next step in the process, as defined in the process definition.

To Reset a Review to a Draft Status
This task can performed by an HR administrator for any review and for any review status.

Prerequisite
Performance > [HR Administration Tools] Performance Review

Steps
1. From the Performance Reviews page, find and open the desired review or the group of reviews you want to reset to Draft.
2. Depending on whether you have selected one or multiple reviews, do one of the following:
   • Open the desired review and from the Performance Review page, select the Reset Review to Draft from the Actions pull-down list.
   • From the list of performance reviews, check the review or the reviews you want to act upon and select the Reset Review to Draft from the Actions pull-down list.
3. When prompted to confirm, click Yes.
   The reviews might not be reset immediately. To see the status of the action, click Show Process History.
   • If the selected reviews were restart, the status will be Completed.
   • If some of the selected reviews can not be restarted, a Partial Action window will open to inform you of the employee(s) for whom the task could not be performed and ask whether you want to proceed with the others.

Result
The selected review(s) will be set back to a Draft status. The employee and manager will get a new task to complete the review.

Target Rating of Competencies Shown in Review
When competencies are imported from an employee's job role, the performance review can show the rating to be attained for each competency in the context of the employee's specific job.

The display of target ratings in performance reviews is possible only for those competencies that are automatically imported from the employee's job role. Therefore, in a review, it is possible that some competencies don't show a target rating as the competency is not drawn from the job role and was not automatically added to the review.

When target ratings are configured to display, they only show once the review is released, in the detail page of the review item, right under the rating provided by the manager.
This feature allows the manager and the employee to see the actual manager rating in contrast with the desired target rating and observe any gaps between the two. The value of the target rating uses the same rating model as the rating selector.

Performance Review Fields

All fields related to Performance Reviews in Taleo Performance are presented in the table below, along with a description and related possible values, when predefined. Each field also indicates the type of information it applies to and the related header. IMPORTANT - Since most of the fields presented in a performance review are configurable and can be set to be shown or not, it is possible that some fields do not show in a given review.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Applicable to</th>
<th>Header</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acknowledge</td>
<td>Optional workflow step done by the employee only that usually follows a review meeting and where the employee indicates his agreement with the review.</td>
<td>Performance Review</td>
<td>Workflow Status Bar</td>
</tr>
<tr>
<td>Acknowledge Date</td>
<td>Date the employee acknowledged the review meeting.</td>
<td>Performance Review</td>
<td>Review Meeting</td>
</tr>
<tr>
<td>Actual</td>
<td>Actual progression value of the goal. This field applies to goals only.</td>
<td>Performance Review</td>
<td>Review Section</td>
</tr>
<tr>
<td>Approve</td>
<td>Optional workflow step done by the designated approver(s) who verify the accuracy and suitability of the review. Depending on the review request configuration, this step might not be part of the process definition, therefore not showing.</td>
<td>Performance Review</td>
<td>Workflow Status Bar</td>
</tr>
<tr>
<td>Author</td>
<td>Name of the author of the review, which corresponds to the employee, in the case of a self-assessment, or to the manager, in the case of employee performance review.</td>
<td>Performance Review</td>
<td>General Information - Current Review</td>
</tr>
<tr>
<td>Author ID</td>
<td>Identification number of the author of the review.</td>
<td>Performance Review</td>
<td>General Information - Current Review</td>
</tr>
<tr>
<td>Author Job Title</td>
<td>Job title of the author of the review.</td>
<td>Performance Review</td>
<td>General Information - Current Review</td>
</tr>
<tr>
<td>Business Unit</td>
<td>Business unit of the employee.</td>
<td>Performance Review</td>
<td>General Information - Employee Information</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Applicable to</td>
<td>Header</td>
</tr>
<tr>
<td>-----------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>------------------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>By</td>
<td>Name of the user who performed the event.</td>
<td>Performance Review</td>
<td>History</td>
</tr>
<tr>
<td>Close</td>
<td>Mandatory workflow step done by the manager and/or the employee that ends the review process. This step is always part of the process definition but might not show up in the workflow status if configured to be executed automatically.</td>
<td>Performance Review</td>
<td>Workflow Status Bar</td>
</tr>
<tr>
<td>Closed Date</td>
<td>Date the review was closed.</td>
<td>Performance Review</td>
<td>Final Comment</td>
</tr>
<tr>
<td>Comments</td>
<td>Editing box used for entering comments related to the rating. To open the Comments box, double-click in the box.</td>
<td>Performance Review</td>
<td>Review Section</td>
</tr>
<tr>
<td>Comments</td>
<td>Section that can contain the manager's and/or the employee's comments about the review overall rating.</td>
<td>Performance Review</td>
<td>Summary</td>
</tr>
<tr>
<td>Compare</td>
<td>Action button that allows the manager to compare various elements in the current review with other those of other employees. The comparison can be done with various employees, depending on the selection made. This button only shows to managers.</td>
<td>Performance Review</td>
<td>Review Section</td>
</tr>
<tr>
<td>Compare with</td>
<td>Option list that allows to select the type of employees to compare the current review to.</td>
<td>Performance Review</td>
<td>Compare feature</td>
</tr>
<tr>
<td>Current Step</td>
<td>Name of the task related to the current step in the review's workflow process.</td>
<td>Performance Review</td>
<td>General Information - Current Review</td>
</tr>
<tr>
<td>Current Step Due</td>
<td>Date the step in progress is due. This date is determined from the date the task is assigned and the duration allowed to complete the task, as per the review request configuration.</td>
<td>Performance Review</td>
<td>General Information - Current Review</td>
</tr>
<tr>
<td>Date and Time</td>
<td>Date and time the event occurred.</td>
<td>Performance Review</td>
<td>History</td>
</tr>
<tr>
<td>Definition Code</td>
<td>Code of the review definition used as the performance review.</td>
<td>Performance Review</td>
<td>General Information - Current Review</td>
</tr>
<tr>
<td>Definition Title</td>
<td>Title given to the review definition when configured.</td>
<td>Performance Review</td>
<td>General Information - Current Review</td>
</tr>
<tr>
<td>Department</td>
<td>Department of the employee.</td>
<td>Performance Review</td>
<td>General Information - Employee Information</td>
</tr>
<tr>
<td>Details</td>
<td>Short description of the event performed on the review.</td>
<td>Performance Review</td>
<td>History</td>
</tr>
<tr>
<td>Employee ID</td>
<td>Identification number of the employee.</td>
<td>Performance Review</td>
<td>General Information - Employee Information</td>
</tr>
<tr>
<td>Employee Information</td>
<td>Section of the Overview that displays information about the employee whose review is in display. Use the Show Details or Hide Details to show or hide the information.</td>
<td>Performance Review</td>
<td>General Information</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Applicable to</td>
<td>Header</td>
</tr>
<tr>
<td>-----------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>--------------------------------</td>
<td>-------------------------</td>
</tr>
<tr>
<td>Employee's Comments</td>
<td>Comments provided by the employee when closing the review.</td>
<td>Performance Review</td>
<td>Final Comment</td>
</tr>
<tr>
<td>Employee's Comments</td>
<td>Comments provided by the employee in regards to the review meeting.</td>
<td>Performance Review</td>
<td>Review Meeting</td>
</tr>
<tr>
<td>Employee's Self Rating</td>
<td>Rating given by the employee for his self-assessment of the goal, competency or custom item.</td>
<td>Performance Review</td>
<td>Review Section</td>
</tr>
<tr>
<td>Event</td>
<td>Name of the event performed on the review. The list of events are related to the various steps in the review workflow, such as Review Closed, Review Assigned, Review Under Approval, etc.</td>
<td>Performance Review</td>
<td>History</td>
</tr>
<tr>
<td>Final Comment</td>
<td>Review section that always shows when the review is closed and that indicates the date and comments provided by the participants when the review was closed. The Final Comment section shows on the left panel menu.</td>
<td>Performance Review</td>
<td>Final Comment</td>
</tr>
<tr>
<td>From ... to ...</td>
<td>Start and end dates that correspond to the review's cycle.</td>
<td>Performance Review</td>
<td>Workflow Status Bar</td>
</tr>
<tr>
<td>General Information</td>
<td>Section of the Overview that displays general information about the review. Use the Show Details or Hide Details to show or hide the information.</td>
<td>Performance Review</td>
<td>General Information</td>
</tr>
<tr>
<td>Highest</td>
<td>Highest rating indicator.</td>
<td>Performance Review</td>
<td>Review Section</td>
</tr>
<tr>
<td>History</td>
<td>Review section that shows a list of the events that have occurred on the review. The History section is by default always displayed to calibrators and managers but not to employees. The related settings are defined during review configuration. When displayed, the History section shows on the left panel menu.</td>
<td>Performance Review</td>
<td>History</td>
</tr>
<tr>
<td>Include Indirect Reports</td>
<td>Checkbox that allows to include in the review comparison the indirect reports.</td>
<td>Performance Review</td>
<td>Compare feature</td>
</tr>
<tr>
<td>Include Self-Evaluation Ratings</td>
<td>Checkbox that allows to include in the review comparison the ratings from the employees self-assessments.</td>
<td>Performance Review</td>
<td>Compare feature</td>
</tr>
<tr>
<td>Job Field</td>
<td>Job field of the employee.</td>
<td>Performance Review</td>
<td>General Information - Employee Information</td>
</tr>
<tr>
<td>Job Level</td>
<td>Job level of the employee.</td>
<td>Performance Review</td>
<td>General Information - Employee Information</td>
</tr>
<tr>
<td>Job Title</td>
<td>Job title of the employee.</td>
<td>Performance Review</td>
<td>General Information - Employee Information</td>
</tr>
<tr>
<td>Last Modified Date</td>
<td>Date of the last change made to the review.</td>
<td>Performance Review</td>
<td>Review Meeting</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Applicable to</td>
<td>Header</td>
</tr>
<tr>
<td>------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>------------------------------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>Lowest</td>
<td>Lowest rating indicator.</td>
<td>Performance Review</td>
<td>Review Section</td>
</tr>
<tr>
<td>Manager's Comments</td>
<td>Comments provided by the manager when closing the review.</td>
<td>Performance Review</td>
<td>Final Comment</td>
</tr>
<tr>
<td>Manager's Comments</td>
<td>Comments provided by the manager in regards to the review meeting.</td>
<td>Performance Review</td>
<td>Review Meeting</td>
</tr>
<tr>
<td>Manager's Rating</td>
<td>Rating given by the manager when evaluating the goal, competency or custom item of an employee. The manager's rating can only be seen in an employee performance review.</td>
<td>Performance Review</td>
<td>Review Section</td>
</tr>
<tr>
<td>Meeting Date</td>
<td>Date of the meeting between the manager and the employee to discuss the review.</td>
<td>Performance Review</td>
<td>Review Meeting</td>
</tr>
<tr>
<td>Not Applicable</td>
<td>Checkbox that allows the rater, if the related permission is granted in the configuration, to mark an item as not applicable. Not applicable items will not be weighted nor be part of the section or overall rating calculation.</td>
<td>Performance Review</td>
<td>Review Section</td>
</tr>
<tr>
<td>Organization</td>
<td>Organization the employee works for.</td>
<td>Performance Review</td>
<td>General Information - Employee Information</td>
</tr>
<tr>
<td>Overall Rating</td>
<td>Overall rating calculated by the system for the entire review, based on the ratings for all sections. This field displays on the summary section of the review. The display of the associated detailed ratings can be toggled on or off with Hide/Show Detailed Rating.</td>
<td>Performance Review</td>
<td>Review Section</td>
</tr>
<tr>
<td>Overview</td>
<td>Heading of the section that presents an overview of the current performance review, such as the information on the employee and on the review in display.</td>
<td>Performance Review</td>
<td>Overview</td>
</tr>
<tr>
<td>Progress</td>
<td>Progression percentage of the goal. This field applies to goals only.</td>
<td>Performance Review</td>
<td>Review Section</td>
</tr>
<tr>
<td>Release</td>
<td>Optional workflow step done by the manager and/or the employee that allows the user to decide when to expose the review to the other party, thus sending the review to the next configured step. Depending on the review request configuration, this step might not be part of the process definition or be set to execute automatically, therefore not showing.</td>
<td>Performance Review</td>
<td>Workflow Status Bar</td>
</tr>
<tr>
<td>Review Meeting</td>
<td>Review section that always shows when a meeting between the manager and the employee has occurred. The Review Meeting section displays in the left panel menu.</td>
<td>Performance Review</td>
<td>Review Meeting</td>
</tr>
<tr>
<td>Review Status</td>
<td>Status of the review as it goes through the review workflow process. The display of the statuses depends on the review request configuration. Possible review statuses are: • Draft - the review has been created and notifications have been sent informing</td>
<td>Performance Review</td>
<td>General Information - Current Review</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Applicable to</td>
<td>Header</td>
</tr>
<tr>
<td>-------</td>
<td>-------------</td>
<td>---------------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| • To be approved  
• Under approval - the review has been submitted by the employee and is awaiting a decision.  
• Approved  
• Released  
• Acknowledgment requested - a request has been sent to the employee and they must acknowledge that they agree with the details of the review.  
• Acknowledged  
• Closed  
• Under Calibration  
• Calibrated  
• Revised | | | |
| Section Overall Rating | Overall rating calculated by the system for the related section. This field displays on the summary of each section. The display of the section's detailed ratings can be toggled on or off with Hide/Show Detailed Rating. | Performance Review | Review Section |
| Section Summary | Heading of the summary of each review section. | Performance Review | Review Section |
| Start Date | Date the goal starts to be evaluated. This field applies to goals only. | Performance Review | Review Section |
| Status | Progression status of the goal. This field applies to goals only. Possible statuses are:  
• In progress - the achievement of the goal is in progression.  
• Not Started - the achievement of the goal has not started.  
• Completed - the goal has been achieved.  
• Canceled - the goal has been canceled. | Performance Review | Review Section |
| Summary | Heading of the summary of the entire performance review. | Performance Review | Review Section |
| Summary | Review section that shows a summary of the review. The display of this summary section is dependent on the review configuration. When displayed, the Summary section shows on the left panel menu. | Performance Review | Summary |
| Target Rating | Field that indicates the rating expected to be attain for the given competency in the context of the employee's job position. | Performance Review | Review Section |
| Update Employee Profile | Optional workflow step done by the manager only that consists of updating the employee's talent profile with the review's information. Depending on the review request configuration, this step might not be part of the process definition, therefore not showing. | Performance Review | Workflow Status Bar |
| Write Review | Mandatory workflow step done by the manager and/or the employee that consist of completing the review by entering the appropriate ratings and comments. This step must be completed by at least the manager. Whether the employee also completes a self-assessment is determined by the review request configuration. | Performance Review | Workflow Status Bar |
Getting Started with Succession Planning

Succession Plan

Succession Planning is the process that an organization goes through to identify a roster of the best persons who will be able to assume a key position in the organization when the person currently in the position moves to a different one, or leaves the organization. Succession Planning is not limited to executive or managerial positions; it can be used to identify the most suitable persons for any position deemed critical to the organization’s success. It can also be designed to identify people who have high potential generally, or who are top performers.

Succession Plan Basics

A succession plan is generally created, tracked and updated by an HR Administrator or the manager of the person whose position is the subject of the plan, not by the person themselves. If you have Manager permissions you can view and manage the succession plan for any of your direct and indirect reports, but not your own. If you have HR Administrator permissions, you can also view and manage the succession plan of all the employees in your organization (including your own).

A succession plan is associated with a position profile, not the person currently in the position (the incumbent). In the event that the person leaves the position (is promoted, transferred, fired, etc.) the succession plan remains associated with the position profile.

An organization has three different options for deciding who they want to include in succession plans: internal employees, external candidates or both. To provide the greatest range of quality successors an organization should look to use both employees and external candidates. Available external candidates are those that applied for a job via Taleo Recruiting and subsequently had their details added to the system. Along with including external candidates in a standard succession plan, they can also be associated with a requisition that is created as part of a succession plan.

Once created, a succession plan cannot be deleted. If all successors are deleted from a plan, the plan remains active, even when empty. The empty plan continues be associated with the position profile.

If the incumbent moves to another position or leaves the organization, and you have the necessary permissions, you can create a requisition directly from a succession plan. Before you can create a requisition, you must typically request your manager to approve the succession plan before you can create a requisition and populate it with the potential successors in the successor plan.

Adding Persons to a Succession Plan

Generally there are three ways to add persons to a succession plan:
1. Perform searches from the Succession Plan page and add persons from the search results.
2. Select persons from a Talent Pool and add them to a plan.
3. Select persons from a Nomination Slate and add them to a plan.

Succession Plan Page Layout

Managers access their succession plans from the Succession Plan link displayed in the Manager Center of their Employee Center homepage. The page layout includes the following features (as shown in the figure below):
1. Breadcrumbs showing the Job Position of the succession plan, and the name of the employee who is the subject of the succession plan.
2. Approval status section.
3. Actions toolbar.
4. Views toolbar (List, Timeline, Matrix)
5. Successors and History tabs/views.
6. Requisition information section.
Search Tools in Succession Planning

The Succession Plan feature of Taleo Performance offers a number of search tools you can use to perform searches for potential successors for a position.

Available tools to search for employees in your organization who might fit as potential successors in a succession plan include: a basic search by employee name, advanced search, and search with Talent Pools and Nomination Slates. The employee profile, initially created from a candidate's resume and then updated as the employee is assessed and rated, provides the basis for searching for potential successors. When searching for successors you must search for employees and candidates separately.

Basic Search by Employee

Search amongst your direct employees and within your network.

Advanced Search

Advanced Search combines search criteria for candidates, employee metrics, keywords, and user-defined fields to determine which employees are retrieved in a search.

Talent Pools

A search amongst members of talent pools.

Nomination Slates.

A search amongst members of a nomination slate.
Viewing a Succession Plan

If you have Manager permissions you can view and manage the succession plan for any of your direct reports and indirect reports, but not your own. If you have HR Administrator permissions, you can also view and manage the succession plan of all the employees in your organization (including your own).

Prerequisite

You must have direct reports to be able to view their succession plans. The exception is if you have HR Administrator permissions, which enable you to view and manage the succession plan of all employees in your organization.

Steps

1. Click Succession Plan. The succession plan of one of your direct reports is displayed. The person's name is displayed in the breadcrumbs at the top of the page.
2. You can perform one of the following steps:
   • Review the succession plan for the person displayed.
   • If you want to view the succession plan of a different direct report, click the dropdown arrow next to the name that is currently displayed near the top of the page. From the list that appears, click the name of a different direct report.
   • If you want to view the succession plan of an indirect report, click the dropdown arrow next to the name that is currently displayed near the top of the page. Then click Other. In the People Selector window, search for employees in your network or by a general keyword search.

Result

The succession plan of the direct report or indirect report you selected is displayed. Employee successors are identified with a blue icon and candidate successors with a green icon. You can perform a variety of operations to manage this person's succession plan.

Timeline Mode

Succession Planning provides a Gantt timeline for indicating the readiness of successors to move to a position should the incumbent move to a different position, leave the organization or be fired.

Succession Planning provides two modes: a succession roster of ranked and unranked candidates, and a Gantt timeline for indicating the readiness of potential successors to move to a position should the incumbent move to a different position, leave the organization or be fired.

The Gantt timeline enables you to create and modify at any time a visual representation of the readiness of all successors in a succession plan.

The default value assigned when an employee is added to a succession plan is “Ready Now”. You indicate an individual's readiness by clicking and dragging the corresponding icon or its right border.

In the Succession Plan's Timeline view the Add Comment option is added to each individual's action dropdown list.
Matrix Mode

The performance matrix enables an organization to better visualize and analyze employees, whether as potential successors in a succession plan or in a talent pool, by presenting employees on a cell matrix using two data points (X and Y axis values).

The most common values used for analysis are the Performance and Potential dimensions, which are the axes set by default. When a matrix is configured and subsequently used, the employees who have been added to the succession plan or talent pool and have data for each of the dimensions (axis values) will fall into a matrix cell. As for those who do not have a data value for one or more of the dimensions that are plotted, they will placed in the Unrated Successors list.

The user has the ability to move employees around from one cell to another. This override functionality is very powerful as the dimension values may not tell the true story. For example, the manager of a succession plan may decide that the original cell placement for an employee overemphasizes his candidacy as a successor. Therefore, he might choose to move that potential successor to a cell of lesser importance/value. Both the original and overridden cell placement are stored in the database.

Typically when an employee is moved from one quadrant to the next in a matrix, it updates metrics for that specific plan or talent pool, however, these changes can be reflected in the employee's talent profile metrics. When you edit a performance matrix, action buttons are provided for updating the metrics for all successors in a matrix or you can select to update individuals.

When an employee has been moved in a matrix, an arrow in the successor's icon indicates their metrics have been overridden. Now you can choose to update employee metrics and commit the change to their person record. When an update has been committed, you cannot automatically return the employee to their original cell, as you could when their metrics had only been changed for that succession plan.

It is important to note that updating employee metrics from a succession plan does not involve succession plan approval workflow. Metrics can be updated regardless of the state of the plan.

A color palette is available to customize a cell’s background color in the configuration module. Also cell distribution details can be displayed, showing the percentage breakdown of the total number of matrix members in each cell.

To provide quick and thorough analysis, multiple matrices can be created and associated to the same succession plan template, allowing the manager to easily move from one matrix to another.

A performance matrix can contain a maximum of 5 columns (X axis) and 5 rows (Y axis), for a total of 25 cells.

Each matrix can present 2 dimensions, one for each axis, and each axis can correspond to any of the 8 available dimension types:

- Performance
- Potential - this metric is customizable. You select the value you want for each division during configuration and do not set thresholds.
- Risk of Loss - this metric is customizable. You select the value you want for each division during configuration and do not set thresholds.
- Promotability Readiness - this metric is customizable. You select the value you want for each division during configuration and do not set thresholds.
- Years in Management
- Years in Industry
- Overall Competency Goal Rating
- Overall Goal Rating

Furthermore, each cell in the matrix can display key metrics on any rated or unrated successor on the succession plan. The succession matrix can be configured to show or hide any or all of the available employee metrics.
• Average Goal % Complete
• Bench Strength
• Career Plan Indicator
• Gap Analysis
• Overall Competency Rating
• Overall Goal Rating
• Performance Rating
• Risk of Loss
• Succession Plan Count

Succession Plan History

History is available for actions that occur within a succession plan.

When viewing events in the History tab, you can display all of them or only those that occurred since the last approval. While the current approval status is always displayed on the plan, approval details — which includes the approver, the date, and any comments — are available from the History tab.

History records are added for the following:

<table>
<thead>
<tr>
<th>History events*</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create plan</td>
<td>Change to approval status</td>
</tr>
<tr>
<td>Add successors to Unranked Successors list</td>
<td>Change successor readiness</td>
</tr>
<tr>
<td>Remove successor from plan</td>
<td>Move successor between Ranked Successors and Unranked Successors list</td>
</tr>
<tr>
<td>Set successor as interim replacement</td>
<td>Rank successor</td>
</tr>
<tr>
<td>Create requisition</td>
<td>Remove requisition</td>
</tr>
<tr>
<td>Set interim replacement in Time Line mode</td>
<td>Restore to original cell in Matrix mode</td>
</tr>
</tbody>
</table>

* Unless indicated otherwise, the events occur in List mode.

History Tracking of Comments

The history of comment entries for Succession Plan updates is tracked, including the following event details:

• creation date
• successor the comment is about
• its creator

Everything but the comment itself is summarized in the Date/Time Event, Event, Details and By columns of the History view. The user can access comment history under the Succession Plan's History tab. If the information in the cells of the grid is truncated due to length, you can click on the history event to open the History Detail dialog for that event.

The following table lists messages for history tracking of succession plan Events and Details.

<table>
<thead>
<tr>
<th>Event</th>
<th>Details</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Readiness has been changed for a successor.</td>
<td>The readiness for &quot;[0]&quot; has been changed from &quot;[1]&quot; to &quot;[2]&quot;.</td>
<td>• The readiness for &quot;Julia Savard&quot; has been changed from &quot;3 months&quot; to &quot;7 months&quot;.</td>
</tr>
<tr>
<td>Event</td>
<td>Details</td>
<td>Examples</td>
</tr>
<tr>
<td>-------</td>
<td>---------</td>
<td>----------</td>
</tr>
<tr>
<td>A comment has been added about a successor.</td>
<td>A comment has been added about &quot;{0}&quot;.</td>
<td>A comment has been added about &quot;Rene Washington&quot;.</td>
</tr>
<tr>
<td>Ranking has been changed for a successor.</td>
<td>The ranking for &quot;{0}&quot; has been changed from &quot;{1}&quot; to &quot;{2}&quot;.</td>
<td>The ranking for &quot;Jonathan Coleman&quot; has been changed from &quot;1&quot; to &quot;3&quot;. The ranking for &quot;Jonathan Coleman&quot; has been changed from &quot;1&quot; to &quot;unranked&quot;. The ranking for &quot;Jonathan Coleman&quot; has been changed from &quot;unranked&quot; to &quot;3&quot;.</td>
</tr>
<tr>
<td>Interim flag has been added for a successor.</td>
<td>&quot;{0}&quot; has been flagged as interim replacement.</td>
<td>&quot;Julia Savard&quot; has been flagged as interim replacement.</td>
</tr>
<tr>
<td>Interim flag has been removed for a successor.</td>
<td>&quot;{0}&quot; has been removed as interim replacement.</td>
<td>&quot;Julia Savard&quot; has been removed as interim replacement.</td>
</tr>
</tbody>
</table>

Figure: Comment History is easily accessed on the succession plan's History view. Each line item is a comment record. Click on a line to view a popup with Comment Details.
Succession Plan Comment Support

Comment Support in Succession Planning provides administrators and managers the ability to add comments or notes while conducting transactions in the module. Comments provide justification and context about Succession Planning activities, so when users return to the transactions at a later date, they have a historical record of why decisions were made and what discussion took place. Most actions performed to add an employee to a succession plan allow users to enter comments.

Characteristics of comments in Succession Planning include the following:

- Ability to edit and delete comments.
- Spell check embedded in comments.
- Comments can contain 6,000 characters.
- Ability to add a general comment about an entire Succession group in List, Timeline or Matrix mode.
- If the Add Comment dialog is left blank then no comment instance is created or tracked.
- Ability to filter recent comments.
- By default, comments are available for viewing by authorized users having access to a succession plan.
- When comments are entered and saved an audit trail is created containing the comment's creator and the creation date.

Adding Successors to a Succession Plan

When adding a successor to a succession plan using Add successors to the plan > Add People, an Add Comment pop-up displays that includes the name of the Succession Plan and accommodates up to 6,000 characters.

Adding Successors from People Search

To streamline the workflow, two steps have been combined into one when adding successors to a succession plan using Add successors to the plan > Advanced Search > People Search. When selecting a person from a list of successors on the People Search dialog, users will confirm the addition of the successor(s) to the succession plan in the same step and within the same new window that a comment can also be added. Comments are not mandatory, so if a comment is not desired, leave the comment area blank and select Yes to add the successor to the Succession Plan without a comment.
Removing Successors from a Succession Plan

Users are given the option to add a comment when removing a successor from a Succession Plan. When users select *Remove the selected successor from the plan* a confirmation pop-up window displays with the option of adding a comment.

In the event that a user removes a successor from a Succession Plan, all the comments entered for this successor are kept in the memory. In the future, should this successor be added back into the Succession Plan again, all the comments entered previously will be restored.

View Recent Comments Pop-up and Editing and Deleting Comments

In the Comment column on the Succession Plan, there's an actionable indicator that displays the number of comments associated to each successor.
Once **View recent comments** is clicked, a pop-up displays with all the comments for that successor. Scrolling is enabled if there are many comments. If there are more than 10 comments, the **View More Comments** link displays. Once this link is clicked, scrolling is enabled and users are able to view all of the comments by scrolling. Clicking the pencil icon brings up the options to edit or delete any or all of the existing comments. Notice that possible misspellings are underlined in red.

Users are only able to edit or delete the comments that they own/authored. The pencil icon only displays next to those comments that are editable by the logged in user.

**Adding General Comments**
Users can add a comment regarding a Succession Plan as a whole. When *Add Comment* is selected from the toolbox, the Comment pop-up displays. This toolbox option is available in the List, Timeline and Matrix modes of the Succession Plan.

Notice that the comment states that it is "For the Succession Plan."

**Recent Comments Filter**

When viewing comments, it's possible to filter them to customize your view. If the logged in user is the author/owner of the comments, they are editable in this filter view as well.
Working with Succession Plans

Creating a Succession Plan

Creating a succession plan consists in identifying potential successors for a position and adding them to a plan in order to quickly find a replacement when a position needs to be filled. A succession plan is created only once and remains active even if it contains no successor(s).

**Prerequisite**

To be authorized to create a succession plan, you must be the manager of the job position, as per defined in SmartOrg, under Job Positions.

**Performance > Manager Center > Succession Plan**

**Steps**

1. You have these options:
   - If a plan or plans exist for one or more of your direct reports the system will display one of them. You can choose to work with that employee's succession plan, or use the breadcrumbs to select another direct report whose plan you want to work with.
   - If a succession plan has never been created for an employee's position, a message appears indicating there is no plan for the position, and asking if you want to create one. If so, click Create. The Create button only appears the first time the plan is created. When first created the Succession Plan is entirely empty.
2. Click the Add Successors to the Plan button to begin adding successors from your direct reports list, or from searches. These successors go to the unranked successors list.
   
   As you add successor to the plan you can add comments documenting your decisions.
3. Rank the top group of unranked potential successors to move them into the ranked successors list.
4. Once the plan is created and successors are added and ranked as desired, save the plan.
5. If plan approval is desired, click the More Actions button and select the Request Approval option.
   
   The approval request goes to the line manager of the person who is the subject of the plan.

**Result**

A succession plan is created for the desired position, and plan approval requested.

Performing Add People Search for Successors

The Succession Plan feature offers a number of search tools you can use to identify potential successors for a position. The employee profile, initially created from a candidate's resume and then updated as the employee is assessed and rated, provides the basis for searching for successors.

**Prerequisite**

**Performance > [Manager Center] Succession Plan**

**Steps**

1. If needed, use the Job Position button in the breadcrumbs to open the desired employee's succession plan.
2. Click the Add Successors to the Plan button, and select Add People from the list of options.
3. You have choices in the People Selector to search by employees, or by keyword search.
• Select Search in My Employees to find potential successors by drilling down through your direct and indirect reports and delegated employees.
• Select Search by Keywords to search either employees or candidates for potential successors. Keyword search checks username, first name, middle initial, last name, and email address fields.
• Select Extended Search to enable fields in the employee's talent profile and additional fields associated with candidates to be searched.

4. Select the check box(es) for the people in the Search Results list you want to include in the succession plan, and click to place them in the Selection list.

Selecting Include Direct Reports will automatically add the selected employees' direct reports.
For each person you select, or each group of persons you select, you will be prompted to add comments documenting your decision. When a comment applies to more than one person the names of the people selected will display in the comment dialog.

5. Click Select to add those in the Selection list to the Unranked Successors list of plan.

Next Step
You can drag and drop unranked successors into the ranked list.
You can also select up to four successors and click to compare their metrics.

Performing an Advanced Search for Successors

The Succession Plan feature offers a number of search tools you can use to identify potential successors for a position. The employee's talent profile, initially created from a candidate's resume and then updated as the employee is assessed and rated, provides the basis for searching for successors. Follow the steps in this section if you want to specify any of a large number of criteria (other than a person's name) in your search. Note in step 5 of this task, when the Add to Current Succession Plan option is selected, the Add Comment dialog is displayed next so you can document your decisions.

Prerequisite
Taleo Performance > [Manager Center] Succession Plan

Steps
1. Select the required employee to display their plan.
2. Click and select Open Advanced Search.

Selecting Add Person displays the People Selector.
3. Select the criteria you want to use to filter your results and click Search.
4. To add a single person from the Employee column, click to display the Go To menu and select Add to current succession plan.
5. To add people, select the checkboxes for each person you want to add and click Actions and select Add to current succession plan.

If one of the people selected is already a plan member, the Add to current succession plan option is not available.

Result
The people are added to the succession plan as unranked successors. You can return to the plan by clicking .
Ranking and Unranking a Successor

When you have a number of successors in a succession plan, you typically want to rank the employees who are best suited to the position and you might have other employees you want to include in a succession plan but do not want to rank for the moment. You can also change an employee's ranking relative to other ranked employees and an unranked employee's position relative to other unranked employees. As well, you can rank an unranked potential successor or vice versa.

Prerequisite

The following steps assume that successors are currently in the succession plan.

Performance > [Manager Center] Succession Plan

Steps

1. The succession plan of one of your direct reports is displayed. The person's name is displayed in the breadcrumbs at the top of the page.
2. While the succession plan is displayed you can perform any of the following tasks.
   • In the ranked successors or unranked successors section, Successor Name column, you can click the drop-down arrow that corresponds to a successor you want to rank, or whose rank you want to change, and then click Set Rank. A dialog allows you to specify the new rank and click OK. The successor is displayed in the ranked successors section in the correct position.
   • In the ranked successors section, Successor Name column, you can click the drop-down arrow that corresponds to a ranked successor you want to move to the unranked successors section, and then click Unrank.
   • You can also drag and drop a successor from one section to the other.
3. After making your changes, click Save.
4. After you rank or unrank a person, you can use the same dropdown list to select Add a Comment, and document your decision.
5. If you continue to make ranking changes, always click Save afterward to save your changes.

Result

The employees you selected are now displayed in the ranked/unranked successors section of the succession plan and the changes are reflected in the succession matrix.

Next Step

When you are satisfied with a succession plan, you can request your manager to approve the plan.

Comparing Successors

You can perform a comparison of potential successors in the ranked or unranked views of the succession plan. You cannot compare an employee successor with a candidate successor.

Prerequisite

You have potential successors and want to compare some of them to determine which of them you should rank higher or lower in the succession plan. The successors you are going to compare must be on the same view.

Performance > [Manager Center] Succession Plan

Steps

1. Press and hold the CTRL key on your keyboard and click the name of up to four people in the ranked or unranked successor views you want to compare.
2. Click 🔍.

**Result**

Information about all the candidates you selected is displayed in a manner that facilitates comparisons.

**Next Step**

When you have identified candidates who you feel would make good successors, you can manage their ranking as appropriate.

---

**Managing a Successor's Readiness**

Managing a successor's readiness consists in specifying the readiness of potential successors for a job position, in the event that the person currently in the position moved to a different position or left the organization.

**Prerequisite**

Open the succession plan for which you want to manage the successor's readiness.

**Performance > [Manager Center] Succession Plan**

**Steps**

1. Make sure you are viewing the plan in a list mode.
   
   If this is not the case, click 📚.
   
2. In the Successors view, locate the successor whose readiness you want to edit.
3. To specify the readiness, click the corresponding ⬇️ in the Successor Name column and select the Edit Readiness option.
4. In the Edit Readiness window, specify the duration in months needed for the employee to be ready to hold that position, starting today.
5. Click OK.

   You can also edit the readiness of successors when viewing the succession plan in the timeline mode, accessible by clicking 📅. In this mode, the readiness is changed by dragging the readiness box border of the desired successor. The system will display the time period as you drag the icon border.
6. When you edit a successor's readiness rating, you can also select the Add Comment dialog from the Successor Name dropdown to enter a comment documenting your decision.

---

**Selecting a Potential Interim Replacement**

A single candidate can be identified as a potential interim replacement in a succession plan. This is an individual who could serve as a temporary replacement in the event that the incumbent leaves the position.

**Prerequisite**

Open the succession plan for which you want to manage the potential interim replacement.

**Performance > [Manager Center] Succession Plan**

**Steps**

1. Locate the name of the person you want to select as a potential temporary replacement in the ranked or unranked successors list and, in the Successor Name column.
2. Click the corresponding drop-down arrow and then click Select as Interim Replacement. (If you later want to remove this designation, click the drop-down arrow and then click Remove as Interim Replacement.)

3. From the same dropdown select the Add Comment option to enter a comment documenting your decision.

Result
In the Interim Replacement column, “Yes” is displayed.

---

**Requesting Approval of a Succession Plan**

**Prerequisite**
The Succession plan status must be *Not Approved*.

**Performance > [Manager Center] Succession Plan**

**Steps**
1. Click *Request Approval* and a confirmation message is displayed.
2. Click *OK* and the status is updated to *Approval in Progress*.
   - You cannot add new successors or change the rankings of existing successors when an approval is in progress, but you can move successors in the matrix of the succession plan.

**Result**
In the approver's My Tasks panel, the Approve Succession Plan task is displayed.

**Next Step**
When the plan is approved, and you want to create a requisition and have the required permissions, you can create a requisition directly from the succession plan and source the requisition automatically with the potential successors in the successor plan.

If the approver rejects the succession plan, you can edit it and send a new approval request to the approver.

Whether your request is approved or rejected, you receive an email message informing you of your approver's decision.

Once a succession plan has been approved or rejected, you can also modify it afterward and request approval of the revised succession plan.

---

**Approving a Succession Plan**

**Prerequisite**
Another user has requested your approval of a succession plan. *Performance > [Employee Center] My Tasks*, or *Performance > [Manager Center] Succession Plan*

**Steps**
1. Locate the succession plan you want to approve in Performance or via email, using one of these methods:
   - Filter *My Tasks* by selecting *Approve Succession Plan*, choose one of the tasks, and then select *Succession Plan* from the Summary Information panel.
   - Open the approval email and click the link for the succession plan. If you are in a single sign-on (SSO) environment you will go directly to the plan, otherwise you will need to login to Performance before being directed to the succession plan.
   - In Succession Planning open the plan you want to approve. An approval section displays at the top of the page.
2. Evaluate the succession plan and decide whether you want to approve it. You cannot edit the plan. You can only approve or reject it.
3. Click **Approve** or **Reject** and enter any comments to document your decision.
4. Click **OK**.

   *Approval In Progress* is replaced by *Approved* if you approved the plan or by *Rejected* if you rejected the plan. The date of the decision is included and the comments are displayed if you hover over the note.

**Result**

An email message is sent to the manager informing them of your decision. If the manager has the required permissions, they can create a requisition directly from the succession plan.

Whether you approve or reject the succession plan, the manager who originally sent the request can edit the plan and send you a new approval request.

**Creating a Requisition**

Once you have received approval for a succession plan, you can create a requisition directly from the succession plan provided you have the required permissions. This action is typically necessary when the incumbent moves to another position, leaves the organization or is fired. When you create a requisition directly from a succession plan, the potential successors are sourced automatically.

**Prerequisite**

- You can only create a requisition directly from a succession plan if you have the required permissions.
- Before you can initiate a requisition, however, the succession plan must be approved by your manager.

**Steps**

1. If your succession has been approved, “Approved” is displayed next to Actions. You can only create a requisition after the succession plan has been approved.
2. Click More Actions and then click Create Requisition or click Create Requisition directly from the toolbar.
   
   If no template has been associated with the job template, the system will display an error message.
3. In the Match Successors dialog box, select which users you want to have matched to the new requisition and click OK.

**Result**

The requisition is created and the chosen successors in the succession plan are automatically matched with the requisition.

**Talent Pools for Succession Plans**

Employees can be added directly to specific succession plans from talent pools

From a succession plan you can choose to search from within a talent pool, enabling you to immediately add pool members to that plan.

If you select **Modify Search** when searching within a talent pool, it reverts to a regular person search and no longer searches solely within that talent pool.
To Search a Talent Pool for Successors

**Prerequisite**
- You must have Manage user type permissions for Succession Plans and Talent Pools.
- Talent pools relevant to the succession plan must be configured.

**Performance > [Manager Center] Succession Plan**

**Steps**

1. Open the Succession Plan you want to work with.
2. Click and select *Search within Talent Pools*.
3. Select the desired talent pool and click *Select*.
   
The Search Results page is displayed, listing the members of the talent pool.
   
   If you select *Modify Search* and change the criteria, the search changes to a regular advanced search and the association with the pool ends.
4. Do one of the following to add persons from the talent pool to the succession plan.
   - Click for a person to add and select *Add to current succession plan*.
   - Select the checkboxes for multiple people and from the *Actions* menu select *Add to current succession plan*.
5. As you add persons to the succession plan you can enter comments to document your decisions.

**Result**

The employees are added to the succession plan as unranked successors.

**Next Step**

You can select additional employees and choose other options such as adding to a different succession plan or a requisition; however, you can only add individual employees to a nomination slate.
Working with Matrices

Viewing a Succession Plan as a Matrix

Viewing a succession plan as a matrix allows managers to view the potential successors in the plan in the form of a succession matrix and to move the successors as they want.

Prerequisite
You must have direct reports to be able to view succession plans. The exception is if you have HR Administrator permissions, which enable you to view and manage the succession plan of all employees in your organization.

If your system configuration enables candidates to be included in a succession plan, they are identified with a green icon, while employees are identified with a blue icon.

Steps
1. Open the succession plan of the desired employee.
2. If needed, add successors to the plan, either as ranked or unranked successors.
3. Click to open the default matrix associated to the succession plan.

Initially, the matrix only shows the rated successors. It is also possible to view the details of an employee's metrics by clicking and selecting Show Details. In the cell, beside the , there is always one metric shown, which corresponds to the metric set to be displayed in the cell, as per the configuration of the succession plan matrix.

4. Click in the matrix list, to the left of the Print button, to change the matrix that is displayed for the succession plan if available.

Next Step
Once the succession plan matrix is displayed, you can move the successors as you want.

Moving a Successor in the Succession Matrix

Moving a successor in the succession matrix allows a manager to override the default ranking of a potential successor in any cell of the available matrices, providing a precise succession planning procedure as well as a year-round analysis tool.

Prerequisite
To be able to move successors around in a matrix, employees must first be added to the succession plan, as ranked or unranked successors.

Steps
1. Open the succession plan of the desired employee.
2. Click to open the default matrix associated to the succession plan.
3. Select one successor and move them to another cell by either dragging and dropping or by clicking on , select the Move to cell option and then specify the destination cell in the Cell Selector window, which also indicates the corresponding dimensions.
If there are many successors in a matrix cell you can use the pager arrow or the show all employees option to find the required successors.

Next Step
If needed, you can restore a successor to its original cell position in the matrix, that is to his position as in the succession plan, before you made changes.

Restoring a Successor to Its Original Cell in the Matrix

Restoring a successor to its original cell in the matrix allows a manager to restore a selected rated successor to the position he had in the matrix before any changes were made.

Prerequisite
If your system allows employee metrics to be updated from a succession matrix and this has been done for a successor, that successor cannot be returned to their original cell using this procedure.

Steps
1. Open the succession plan of the desired employee.
2. Click to open the default matrix associated to the succession plan.
3. Locate the successor for which you want to restore the original position, click and select Restore to original cell.

Result
When a successor is rated, he is moved back to his original cell. However, if the successor in the matrix was not rated, he will be moved back to the list of Unrated Successors.

Updating Employee Metrics from a Succession Matrix

An employee's metrics can be updated directly from a succession plan matrix, replacing their existing talent profile metrics with those from the succession matrix.

Prerequisite
- Refer to Customizable Metrics in the Performance Management Configuration Guide for information about migrating your system to customized employee metrics and their use in matrices and charts.
- The successor who is being updated must be an employee, as candidates do not have metrics that can be updated.

Steps
1. Open the succession plan for the required job position.
2. Click to open the default matrix associated to the succession plan.
3. Select an employee, indicated by a blue icon, and drag them to a different cell. The employee icon is updated to include an arrow indicating that the employee's metrics have been overridden for this succession plan.
4. Click beside the employee, select Update Metrics and click OK in the confirmation dialog box.

You can select Update Metrics from the main menu to update multiple employees at once.

Result
The arrow is removed from the icon as the employee metrics have now been updated and the employee can no longer be restored to their original cell.
Employee Metrics Calibration in Succession Matrix

This feature provides the ability to export, via Performance Management TCC, the matrix’s dimension values calibrated in the Succession Matrix, to store those new values and to populate them back to the Talent Profile’s employee metrics via SmartOrg TCC.

When performing a common talent calibration, employees fall in one of the boxes in the succession matrix, each box indicating a level corresponding to the location on the box. When calibration occurs and an employee is moved from one box to another, the system stores the new dimension levels for that employee, as well as maintaining the original ones.

Example:

A succession matrix showing the Potential and Risk of Loss dimensions (that being the X and Y axis of the matrix)

Let’s say that an employee is moved for the low potential/low risk of loss box to the low potential/medium risk of loss box. In such a situation, the overridden values would be exported via Performance Management TCC and imported back to the Talent Profile’s employee metrics via SmartOrg TCC.

This export process is possible via the Performance Management TCC (with the latest 7.5 SP9 TCC feature pack).

Consult the Integration (Taleo Connect Client) documentation for more information.
Moving an Unrated Successor

Unrated successors are those that did not have values for the metrics used to create the matrix, when they were initially added to it.

Prerequisite

There must be unranked successors associated with the succession plan.

Steps

1. Open the succession plan of the required employee.
2. From the More Actions menu, select Show Unrated Successors.
3. From the Unrated Successors list, do one of the following:
   a) Drag and drop the successor into a cell in the matrix.
   b) Beside the successor, click and select Move to cell. In the Cell Selector window, click on one of the cells and click OK.

Result

This successor is added to the cell and displayed with an arrow icon to indicate this is not the person's original place in the matrix.

Printing a Succession Plan Matrix

Printing a succession plan matrix allows to generate a PDF version of the succession plan, as per the configuration of the printed metrics.

Steps

1. Open the desired succession plan.
2. Click to open the default matrix associated to the succession plan.
3. Click the Print button to display the print preview.
4. When the succession plan matrix is opened as a PDF file, from the File menu, select Print.

Result

The succession plan matrix will be printed as per the defined configuration of the printed metrics.
Succession Nominations

This feature makes it easier for people to collaborate on succession plans; through a straightforward process for nominating persons to a nomination slate, validating them, and adding persons from the nomination slate to a plan.

While you need to have access to a succession plan to work with it, you do not need to have access to the plan to nominate someone. Once someone is nominated they are added to the nomination slate for that position. Plan owners can then review the nominees and decide to add them to the plan or reject them. People can be nominated from search results, talent pools, the talent browser and the talent profile. History is kept, recording when a nomination slate is created and when people are added, deleted, or have had their status change.

Taleo Connect Client (TCC) can be used to export a nomination slate. Also a TCC import can be used to reset nomination slates by deleting them.

Nominating Successors

Multiple members of your organization can be involved in the nomination process. Any employee can nominate someone within their part of the company for a position, without requiring access to the succession plan. Subsequently the succession plan owner can review those nominees and add suitable ones to the plan.

- Nominating people for a position
- Reviewing nominees
- Adding nominees to a plan

Nominating People for a Position

Nominating someone for a position can take place from that person’s talent profile, search results, the talent browser, and the members list of a talent pool.

You can choose to nominate any employee you have access to and choose from any succession plan for an active position in your system. Once you have nominated someone, they are added to the nomination slate for the succession plan of that position. You can also nominate people in context. When searching within a succession plan or a talent pool associated with a position, you can directly add someone to that specific nomination slate.

You can add yourself to a succession plan's nomination slate.

To Nominate People

Prerequisite

The configuration setting Enable Succession Nominations must be enabled.

The nominator must have the Allow nominations user type permission.

The job position must be active.

Performance > Search Results

Performance [Quick Links] > Talent Pools

Performance > Talent Profile
Performance [Quick Links] > Talent Profile

Steps
1. From Search Results or from the Members list of a talent pool, click and select Nominate for a position...
   OR
   From a Performance Card in the Talent Browser, click and select Nominate for a position...
   OR
   From the Talent Profile select Nominate for a position...

2. Enter criteria — this can include partial words — which builds an AND relationship search query. This means each term must be present to return a search result.

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keyword</td>
<td>This searches the position name, position code, and the description.</td>
</tr>
<tr>
<td>Position Title</td>
<td>The name of the position associated with the succession plan.</td>
</tr>
<tr>
<td>Manager Name</td>
<td>The name of the manager for the job position, which may not be the incumbent's manager.</td>
</tr>
<tr>
<td>Incumbent Name</td>
<td>The name of the person currently in the position.</td>
</tr>
</tbody>
</table>

3. Click Search.
   You must click Reset before you enter different criteria and search again.

4. Select the position and the job description is displayed and you can select a readiness option and add a comment.
   The readiness value selected here is not carried through to the succession plan if the person is added to the plan from the nomination slate.

5. Click Nominate.

Result
The person is added to the Nomination Slate for the chosen position.

To Nominate People in Context

Prerequisite
The configuration setting Enable Succession Nominations must be enabled.

The nominator must have the Allow nominations user type permission.

The talent pool context must include a position.

Performance > [Manager Center] Succession Plan > Search Results
Performance > Talent Pools

Steps
1. From Search Results or from the members list of a talent pool, click for a specific person and select Nominate for this position.

   The job description, qualifications, and responsibilities are displayed.
2. Select a readiness option and add a comment. The readiness value selected here is not carried through to the succession plan if the person is added to the plan from the nomination slate.

3. Click **Nominate**.

**Result**

The person is added to the Nomination Slate for the position related to this succession plan or talent pool.

---

### Reviewing Nominees

This gives the owner of the succession plan the opportunity to view the details of nominees and decide whether they should be accepted or rejected as potential successors.

The Nomination Slate displays the nominees for the succession plan and provides the opportunity to filter the list to those who match the criteria for the position. Subsequently setting a nominee's status from **New**, to **Pending additional information**, to **Under consideration**, to **Approved**, or **Rejected**, helps indicate their suitability. It also provides a quick glance overview of the quality of those nominated as successors.

**To Review Nominees**

**Prerequisite**

You must be the owner of the succession plan.

**Performance > [Manager Center] Succession Plan**

**Steps**

1. Select **More Actions > Nomination Slate**.
2. Select the filters to narrow the nominees to meet your criteria and click ✪.

   For details on using filters, see **Review Filtering**.
3. Click ✪ to display the **Actions** menu and select a module to see more details on the nominee.

   Use your browser's back button to return to the Nomination Slate.
4. Change the **Status** to indicate the person's suitability as a successor.

   If the same person has been nominated multiple times, changing their status for one instance will update the entire list.

**Next Step**

Promising successors can be added to the plan.

---

### Adding Nominees to a Plan

After reviewing nominees you can add them to the succession plan.

Added nominees are removed from the **Nomination Slate**; however, if someone subsequently nominates them again they will be added to the slate again.

**To Add Nominees**

**Prerequisite**

You must be the owner of the succession plan.
Performance > [Manager Center] Succession Plan

Steps

1. Select More Actions > Nomination Slate.
2. Beside a nominee's name, click to display the Actions menu and select Move to succession plan.

   OR

   Select the checkboxes beside multiple nominees and select More Actions > Move to succession plan to add more than one nominee at a time.

3. As you add persons to the succession you are prompted to enter comments to document your decision. When an employee is added to a succession plan from the Nomination Slate, existing comments entered while performing the nomination are moved to the succession plan.

Result

The selected nominees are removed from the nomination slate and added to the plan's Unranked Successors list.

Nomination Slate History

This provides a record of events for the nomination slate and the nominees included in it.

You select Go to Nomination Slate from the succession plan to access the history. The events that are recorded in the history include:

- Nomination slate creation
- Adding a nominee to the slate
- Removing a nominee from the slate
- Additional nominations of a nominee
- Nomination status change
HR Administrators Working with Succession Plans

Viewing a Succession Plan

Viewing a succession plan allows an HR administrator to access a succession plan that is pending, whether the approval has not yet been requested or the approval is in progress or rejected.

**Prerequisite**

[HR Administration Tools > Succession Plan]

**Steps**

1. Filter the approval requests in order to view the desired succession plan.
2. In the result grid, click the name of the corresponding employee.

**Result**

The Succession Plan page displays and shows the successors for the job position held by the selected employee.
Career Management

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Getting Started with Career Management

Career Planning

The Career Planning feature of Taleo Performance allows an employee and/or the manager to lay out a series of career scenarios in the employee's career plan. The scenarios are independent of one another so there can be overlaps in the jobs contained in each scenario.

Career planning is based on job roles rather than positions, which enables you to build more generic career scenarios. For example, there might be a Regional VP of Sales job role and three positions -- one for an eastern region, one for a central region and one for a western region. When outlining your career scenarios, or the career scenarios of your employees if you are a manager, you would indicate the person's interest in the job role of Regional VP of Sales rather than in one of the individual positions.

Additionally, there are no requirements that force a particular job progression or sequence. For example, a person may be in an Vice President of Support role, but has a desire to move to Sales. The Career Planning feature allows to account for “demotions” as well as lateral moves. The Vice President of Sales can add a job role of Sales Manager followed by Vice President of Sales.

The Career Planning feature is available in Taleo Performance when the Career Planning Enabled setting in Taleo Performance Administration is set to Yes. The setting is located at:

- Taleo Performance Administration > Settings > Career Planning

The Career Planning feature is also dependent on the Job Roles configuration.

Benefits

- Can increase employee loyalty and retention within the organization.
- Offers the employee the possibility of planning his/her future within the organization while reducing the probability the person will search for career opportunities outside the organization.
- Complements an internal career site: while employees can use a career site to learn about opportunities that can lead to the next step in their career, career planning allows them to think about their long-term future with the organization.

Career Plan

A career plan is one or a series of career scenarios (or paths) that an employee might be interested in pursuing in the organization. Each scenario is composed of a series of steps and each step is associated with a job role. A step (and the corresponding job role) can be unique to a scenario or can be used in multiple scenarios.

A career plan is composed of one or multiple scenarios and each scenario is composed of one or multiple steps. The number of scenarios possible in a career plan as well as the number of steps (and corresponding job roles) allowed in each scenario are determined in Taleo Performance Administration.

- Taleo Performance Administration > Settings > Career Planning > Maximum Number of Scenarios
- Taleo Performance Administration > Settings > Career Planning > Maximum Number of Career Steps

Employees can create their own career plan or managers can perform this task on behalf of their direct reports. Any action taken on a career plan is applied automatically and requires no approval either from the employee or the manager. For example, an employee could create a career plan for himself/herself and the plan could be modified afterward by the person's manager without obtaining the employee's consent.
Career Scenario

A career scenario is a series of steps for career advancement. A career scenario and its steps are defined by the employee himself/herself or by the employee's manager. A career scenario can be “vertical”, for example, manager > director > vice president, or “lateral”, if the employee seeks to gain broader experience, for example, business analyst > solution consultant > consulting director.

The number of scenarios possible in a career plan, as well as the number of steps (and consequently, job roles) allowed in each scenario, are both determined in Taleo Performance Administration.

- Taleo Performance Administration > Settings > Career Planning > Maximum Number of Scenarios
- Taleo Performance Administration > Settings > Career Planning > Maximum Number of Career Steps

Furthermore, although a specific job role can only be included once in the same scenario, it can be included in any number of other scenarios.

Career Step

A career step corresponds to a specific job role in a career scenario. Though a particular job role can only be used once in a scenario, it can be used in any other scenario, at the same step or at a different step.

The number of steps (and consequently, job roles), allowed in each scenario is determined in Taleo Performance Administration.

- Taleo Performance Administration > Settings > Career Planning > Maximum Number of Career Steps

Furthermore, although any one job role can only be included once within the same scenario, it can be included in any other scenario.

As stated earlier, though a particular job role can only be used once in a scenario, it can be used in any other scenario. For example, you could have multiple scenarios with identical steps and associated job roles with the exception of the last step whose job role would be different for each scenario.

Job Role Search

The job role search capability offered in Career Planning allows you to search job profiles to find job roles that represent career moves that might interest you.

You can perform three different types of searches.

- Keyword Search - Used when you want to search for a specific text string. Keyword Search will search all the following sections for the string.
  - Name of job profile
  - Description of job profile
  - Name of competency
  - Name of requirement

  The following keyword search options can be selected.
  - Search for exact match of a string with the use of quotation marks.
  - Search for partial strings of text with the use of wildcard characters.
  - Search for multiple words without the use of the AND boolean operator.
• Search for any of a list of words with the use of the OR boolean operator (the operator needs to be in upper case).

• **Advanced Search** - Used when you want to perform complex searches for job roles that include, either as a requirement or an asset, a specific job level, job field or competency. If the criterion is optional, you can specify the relative weight of the criterion, from 1 to 5.

• **Best Fit Search** - Used to perform a search for job roles that best correspond to the competencies of the employee's current job.

**Fit Analysis**

The Fit Analysis tool available in a career plan allows you to see the list of competencies that are part of a particular job role and the gap between an employee's current rating and the recommended rating for the job role.

The Fit Analysis can be performed for any job role card related to a specific job role or for the current job. The Fit Analysis tool panel displays up to three different sections: Strengths, Improvements and Unknown Areas.

• **Strengths** - This section lists the competencies where the employee has been rated higher than the recommended rating for the job. The competency must be a requirement for the job for it to appear in the strengths.

• **Improvements** - This section lists the competencies where the employee has been rated lower than the recommended rating for the job.

• **Unknown Areas** - This section lists the competencies that are required for the job but for which the employee has not been evaluated.

For each of these sections, the recommended rating as well as the employee's current rating (if available) are displayed graphically. If no competencies match the criteria of the section, the section is not displayed. By default, three competencies are displayed per section, but a **More** link is provided to display all available competencies in each section.

**Benefits**

• Provides employees with guidance on what is needed for them to achieve certain career aspirations.

• By focusing first on strengths, rather than exclusively on gaps, the employee's true fit for a given career path can be better highlighted.

**Impacts**

• For the fit analysis to be meaningful, job roles must be established with competency requirements and the employee must have received competency ratings via a performance review or a TCC import.

**Performing a Keyword Search for Job Roles**

Performing a keyword search for job roles allows to search for entire words or word stems in job profiles, more precisely in the name or description of job roles or in the name of competencies or requirements included in job profiles.

**Steps**

1. Open the career plan (your career plan or the career plan of a direct report if you are a manager).
2. When the Career Plan window is displayed, select **Add a career step** to bring up the search.
3. In the Job Role Search section, enter the text string you want to search for in the **Job Role** or **Job Field** fields.

   You can enter any of the following types of information, depending on what you are searching for:
• Text string - Enter an entire word or just a part of a word to search for all occurrences of that word or word stem. For example, if you entered “manage” (without the parentheses), the result list would include all occurrences of “manage” including words such as “manage”, “management”, “manager”, “manages”, etc.

• Exact match - Enter the exact string in quotation marks that you are looking for. Example: You would enter “sales manager” including the parentheses to search for job roles that included that specific string.

• Multiple words and/or word stems - Enter a combination of words, separated by a space, to search for job roles that contain all the words. For example, you would enter “manage direct” without the parentheses to search for all job roles that contained both words that begin with “manage” and words that begin with “direct”.

• One string or another - Enter multiple words separated by the boolean operator OR to search for job roles that contain any of the words. The operator OR must be entered in uppercase. For example, enter “manager OR director OR sales” (without the parentheses) to search for all job roles that include at least one of the words. The search results might contain job roles that more than one of the words.

4. Click Search.

The system searches for the text string in the following sections of job profiles:

• Name
• Description
• Competency Name
• Requirement Name

Result

The job roles that correspond to the search criteria are displayed in the Job Role Search Results window.

Performing an Advanced Search for Job Roles

Performing an advanced search for job roles allows users to search for job roles based on a specific job field or job level or competencies, which can be requirements or assets for the job role.

Steps

1. Open your career plan or the career plan of a direct report if you are a manager.
2. When the Career Plan window is displayed, click Add a career step to bring up the search.
3. In the Search for a Job Role section, click Advanced Search.
4. In the Advanced Search window, click the check box next to a criterion you want to include in the search.
   For the Job Field and Job Level criteria, you must also select a value.
   Use scroll bar to move up or down in the window as necessary.
5. Indicate whether the criterion is mandatory or optional by selecting the corresponding option.
   • If the criterion is optional, you can specify the relative weight of the criterion, from 1 to 5.
6. Perform steps 4 and 5 for each criterion you want to include in the search.
7. Click Search.

Result

The job roles that correspond to the search criteria are displayed in the Job Role Search Results window. The Fit column indicates the match percentage of the job role in relation to the search criteria.
Performing a Search for the Best Fit Job Roles

Performing a search for the best fit job roles allows to quickly search for job roles that include competencies that are the same or similar to those of the employee's current job.

**Steps**

1. Open your career plan or the career plan of a direct report if you are a manager.
2. When the Career Plan window is displayed, click *Add a career step* to bring up the search.
3. In the Search for a Job Role section, click *Best Fit*.

**Result**

The Job Role Search Results window displays all the job roles that best correspond to the current job.

Performing a Fit Analysis

Performing a fit analysis is useful to see how well an employee fits with a particular job role included in a career scenario by showing the gap between the recommended rating for a competency included in a job role and the employee's rating.

**Steps**

1. Open your career plan, or the career plan of a direct report if you are a manager.
2. In the Career Plan window, click ![Expand Tools Panel](image) to expand the Tools panel.
3. In the Career Plan window, click the job role card for which you want to view a competency fit analysis.
4. The competencies of the job role are automatically displayed in the Fit Analysis panel, under any one of three possible categories - Strengths, Improvements or Unknown Area. The rating of an employee for a particular competency compared to the recommended rating specified in the job role determines the category in which the competency is displayed.

   If the More link is displayed, you can click it to view additional competencies and to scroll through the information.

5. To see the fit analysis of another job role included in a scenario, click the corresponding job role card. The fit analysis information changes automatically.
6. To close the Fit Analysis panel when you are done, click *Hide the supporting tools*.

Viewing a Career Plan

Viewing a career plan allows to see all your career scenarios or, if you are a manager, those of a direct report.

**Prerequisite**

Prior to viewing a career plan, the Career Planning Enabled setting must be set to Yes in Taleo Performance Administration and a career plan must already exist.

**Steps**

1. Perform one of the following steps.
   - To view your own career plan, click *Quick Links > My Career Plan*.
   - If you are a manager and you want to view one of your direct report's career plan, click *Manager Center > Career Plan*. 
2. If you are a manager and you want to view a direct report's career plan, select the employee's name in the employee list. You can also view the career plan of a different employee by selecting the name of the direct report in the employee list.

**Result**

The Career Plan window displays your career scenarios or those of the employee you selected.

**Next Step**

You can add a new scenario or edit or delete an existing one.
Working with Career Plans

Creating a Career Plan

Creating a career plan involves creating career scenarios that include a series of job roles. Each scenario corresponds to a career path that the employee could potentially pursue within the organization. A career plan is created for an employee by the employee himself or by the employee's manager. A career plan is created only once and remains active even if it contains no scenario.

Steps

1. If a career plan has never been created, a message appears asking whether you want to create a career plan. Click Create. Note that the Create button only appears the first time a plan is created.

   The first scenario is created automatically and is named My Scenario by default. If you do not want to use the name My Scenario delete this first scenario before adding job roles to it because scenario names cannot be changed afterward.

2. If the career plan already exists (your own or the career plan of a direct report if you are a manager), open it.
   - To open your own career plan, click Quick Links > My Career Plan.
   - To open the career plan of one of your direct reports, click Manager Center > Career Plan.

3. Create a scenario. See Creating a Scenario.

4. Add job roles to the scenario, either by performing a job role search or a fit analysis, or by dragging any job roles included in another scenario to the scenario you are working on. See Adding a Job Role to a Scenario.

Result

The career plan can contain the maximum number of scenarios allowed or no scenario at all. Even when empty, a career plan cannot be deleted.

Creating a Scenario

Creating a scenario allows users to add a sequence of job roles that together form a career plan. You can create scenarios for yourself or for any of your direct reports, if you are a manager.

Prerequisite

You can create a scenario if you have not exceeded the maximum number of scenarios allowed in a career plan. The number is set in Taleo Performance Administration > Settings and the setting is Maximum Number of Scenarios.

Steps

1. Open your career plan or the career plan of the direct report if you are a manager.

2. In the Career Plan window, click Start New Scenario.

3. In the New Scenario window, enter the name of the scenario you want to create.

   Because scenarios are sorted alphabetically and the name of a scenario cannot be edited once created, you might consider naming your scenarios such that they are listed in a particular way.

4. Click OK.
In the new scenario section displayed in the Career Plan window, the job card of the employee's current job is automatically inserted.

5. You now need to add job roles to the career plan scenario, either by performing a job role search or a fit analysis, or by dragging job roles included in scenario to the scenario you just created.

Adding a Job Role to a Scenario

Adding a job role to a scenario is used when creating or editing a scenario, either by performing a job role search or a fit analysis, or by dragging job roles included in a scenario to the current scenario.

Prerequisite

A job role can be added to a scenario at any time as long as the maximum number of steps has not been reached. The Maximum Number of Career Steps setting is defined in Taleo Performance Administration > Settings.

Steps

1. Open your career plan or the career plan of a direct report if you are a manager.
2. Select one of the following actions.
   - Adding a Job Role from an Existing Scenario - This is the only job role addition task that can be performed directly in the Career Plan window. There are 2 possibilities - when you drag a job card from a scenario that is displayed to a location in the current scenario, the job role is copied and will therefore be in both scenarios; if you press the shift key at the same time as you drag a job card, the job role will be moved to the current scenario instead of being copied.
   - Adding a Job Role from a Job Role Search - This method offers various search criteria you can use to search for job roles that you can then add to a scenario.

Adding a Job Role from an Existing Scenario

You can add a job role to a scenario by dragging the job role from one scenario and dropping it on the first scenario. This method is typically used to quickly create multiple scenarios that all have the same sequence of job roles with the exception of the last step.

Steps

1. Open your career plan, or the career plan of the direct report if you are a manager.
2. In the scenario that contains the job role you want to add, click the card of the job role and drag it to the desired location in the destination scenario.
   
   When the icon appears, you can drop the scenario.

   If a icon appears instead, continue to drag the card until you find an acceptable location and the icon appears. You can then drop the scenario.

Adding a Job Role from a Job Role Search

Adding a job role from a job role search is the most common method to add job roles to a career plan scenario.

Steps

1. Open your career plan, or the career of a direct report if you are a manager.
2. In the Career Plan window, select *Add a career step*.

3. Use one of the following search types:

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Keyword Search</strong></td>
<td>Enter the name or partial name of the job role, along with words from the job role profile (Description, Qualifications, Responsibilities).</td>
</tr>
<tr>
<td><strong>Advanced Search</strong></td>
<td>This enables additional job role fields to be included, such as Job Level, Job Field, and competencies.</td>
</tr>
<tr>
<td><strong>Best Fit</strong></td>
<td>This displays job roles that correspond the best to the competencies that are part of the employee's current job role.</td>
</tr>
</tbody>
</table>

The Job Role Search Results window displays all the job roles that correspond to the search criteria you specified. For each job role found, the list also displays the corresponding job field, job level, status (whether the job role is already used in a scenario or not) and the fit percentage compared to the current job's competencies. On the result page, you can also view the job profile of any listed job role by clicking on the name of the Job Profile.

4. In the Job Role Search Results list, locate the job role you want to add, click on the name to highlight it, and then select *Add Step*.

**Next Step**

You might want to reorder the job roles in the Career Plan window, which provides a better view of a scenario and its job roles.

### Viewing Feedback on a Career Plan

Viewing feedback on a career plan, either yours or the career plan of a direct report, is used when you want to view someone else's opinion and rating on an entire scenario or on specific job roles with regard to you or the direct report.

**Prerequisite**

You can only view feedback when it has been provided for the job role that corresponds to the card selected in the career plan.

**Steps**

1. Open your career plan or the career plan of the direct report if you are a manager.
2. In the Career Plan window, click to expand the Tools panel.
3. Click *Feedback* to open the corresponding panel.
4. In the Career Plan window, click the job role card for which you want to view feedback that might have been provided.
   
   Note that if no feedback has been provided, you might want to request feedback by clicking *Ask For Feedback*.
5. If there is feedback, it is displayed in the Feedback panel along with the name and job title of the person who provided the feedback, the date of the feedback, the rating given (if any), and comments (if any).
   - To view the entire content of the feedback, double-click the feedback text in the Feedback panel.
6. To close the Feedback panel, click *Hide the supporting tools*.
Reordering Job Roles

Reordering job roles is frequently performed after you have run a job role search and dragged job roles from the result list to the Career Plan.

**Steps**
1. Open your career plan, or the career plan of the direct report if you are a manager.
2. In the Career Plan window, click a job role card you want to move to a different position and drag it to the desired step, dropping it between two cards or directly on top of one. The icon indicates that the current position is invalid.
   
   If a job role card is dragged from one scenario to another, the card is copied to the second scenario and the job role card is part of both scenarios.

Removing a Job Role from a Scenario

Removing a job role from a scenario deletes it from the scenario. You or your manager can perform this action.

**Steps**
1. Open your career plan, or the career plan of the direct report if you are a manager.
2. In the Career Plan window, locate the scenario that contains the job role you want to delete.
3. On the job role card, click to open the option menu and then select **Delete this step**.
4. Confirm the deletion by clicking **Yes**.

**Result**

The job role is deleted from the scenario. It is not deleted from other scenarios that include it.

Deleting a Scenario

Deleting a scenario removes an entire sequence of job roles from a career plan.

**Steps**
1. Open your career plan, or the career plan of the direct report if you are a manager.
2. In the Career Plan window, click the icon next to the scenario name that you want to delete and select **Delete this scenario**.
3. When a confirmation request appears, click **Yes**.

**Result**

The deleted scenario is no longer displayed in the Career Plan window.

Career Plan Fields

Fields and buttons related to career plans in Taleo Performance are presented in the following table. Each entry in the table includes a field or button, a description, possible values (when they are predefined), the part of the application to which the field applies and the field’s section header.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Applicable to</th>
<th>Header</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual Rating</td>
<td>Actual rating of the employee for any competency of the selected job role, if the competency has ever been evaluated as part of an employee review. If the employee's actual rating</td>
<td>Career Plans</td>
<td>Fit Analysis</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Applicable to</td>
<td>Header</td>
</tr>
<tr>
<td>---------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------</td>
<td>-------------------------</td>
</tr>
<tr>
<td></td>
<td>is higher that the recommended rating, it will be shown under Strengths, and if lower, it will be under Improvements. If the competency has never been evaluated for the employee, it will be shown under Unknown Areas.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advanced Search</td>
<td>Search option that enables you to specify a series of criteria when you are searching for job roles.</td>
<td>Career Plans</td>
<td>Job Role Search</td>
</tr>
<tr>
<td>Best Fit</td>
<td>Search option that allows to find job roles that best correspond to the competencies of the employee's current job.</td>
<td>Career Plans</td>
<td>Job Role Search</td>
</tr>
<tr>
<td>Current Job</td>
<td>In the Career Plan window, this column of the plan automatically displays the employee's current job, in every scenario.</td>
<td>Career Plans</td>
<td>Career Plan</td>
</tr>
<tr>
<td>Feedback</td>
<td>Tool used to request feedback on a career plan scenario and/or on specific career steps of a scenario.</td>
<td>Career Plans</td>
<td>Toolbox</td>
</tr>
<tr>
<td>Field</td>
<td>Field on which the search will be performed. To make a selection, you only need to check all desired fields. For Job Level and Job Field fields, you also need to select the applicable value.</td>
<td>Career Plans</td>
<td>Advanced Search</td>
</tr>
<tr>
<td>Fit</td>
<td>Percentage that indicates how the job role fits the search criteria specified.</td>
<td>Career Plans</td>
<td>Job Role Search Results</td>
</tr>
<tr>
<td>Fit Gap</td>
<td>Gap between the employee's ratings - as viewed in the Fit Analysis - and the expected ratings for the job role. 100% means there is no gap. For instance in the Fit Analysis there may be 10 items and the employee meets or exceeds 7 of those items. Their fit percentage would be 70%.</td>
<td>Career Plans</td>
<td>Job Card</td>
</tr>
<tr>
<td>Fit Analysis</td>
<td>Tool used to obtain an analysis of the difference between the recommended rating for each competency in the job role and the rating the employee has obtained for each competency (where applicable).</td>
<td>Career Plans</td>
<td>Toolbox</td>
</tr>
<tr>
<td>Job Field</td>
<td>Job field associated with the job role, as per the job role definition in SmartOrg.</td>
<td>Career Plans</td>
<td>Job Role Search Results</td>
</tr>
<tr>
<td>Job Level</td>
<td>Job level associated with the job role, as per the job role definition in SmartOrg.</td>
<td>Career Plans</td>
<td>Job Role Search Results</td>
</tr>
<tr>
<td>Job Role Search</td>
<td>Tool used to search for job roles.</td>
<td>Career Plans</td>
<td>Toolbox</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the job role, as per its definition in SmartOrg.</td>
<td>Career Plans</td>
<td>Job Role Search Results</td>
</tr>
<tr>
<td>Options menu</td>
<td>You can use the Options menu to view the job profile that corresponds to the job role or to add the job role to an existing scenario. From a job role card included in a scenario, you can use the Options menu to view the corresponding job profile or to delete the job card from the scenario.</td>
<td>Career Plans</td>
<td>Status Job Card</td>
</tr>
<tr>
<td>Recommended Rating</td>
<td>Recommended rating required for any competency of the selected job role.</td>
<td>Career Plans</td>
<td>Gap Analysis</td>
</tr>
<tr>
<td>Search Type</td>
<td>When a field is to be included in the advanced search and the corresponding box is checked, the search type options become active. There are two options:</td>
<td>Career Plans</td>
<td>Advanced Search</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Applicable to</td>
<td>Header</td>
</tr>
<tr>
<td>---------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------------</td>
<td>-------------------------------</td>
</tr>
<tr>
<td></td>
<td>• Mandatory - The selected field MUST be present for a job role to be returned in the search results.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Optional - The selected field is optional and will be searched according to the specified weight.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Step</td>
<td>In the Career plan window, the Step column displays any job role that has been added to the scenario. The number of steps that can be added to a scenario is dependent of the corresponding setting, Maximum Number of Career Steps, defined in Taleo Performance Administration.</td>
<td>Career Plans</td>
<td>Career Plan</td>
</tr>
<tr>
<td>View Job Role</td>
<td>Actions menu option, available from the job role card or the Job Role Search Results page, that opens the profile of the related job role, with a complete description and all associated competencies and certifications.</td>
<td>Career Plans</td>
<td>Options menu</td>
</tr>
<tr>
<td>Weight</td>
<td>When a field is selected as a search criteria and optional, you have the possibility of specifying the relative weight from 1 to 5.</td>
<td>Career Plans</td>
<td>Advanced Search</td>
</tr>
</tbody>
</table>
Development Planning

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Getting Started with Development Planning

Development Planning

Development Planning complements the Career Management functionality. It offers the ability for employees to create and manage development plans both from a central location as well as in-context throughout Taleo Performance. The development plan enables employees to manage development goals and determine the specific development activities needed to achieve those objectives, whether it be to improve in a current role or to help attain a future role.

Development planning enables employees to not only explore future potential career paths, but to view, monitor, and progress through the development activities necessary to attain them. These activities can be to focus on suggested or desired areas of general improvement or in support of specific goals that the employee will be undertaking as part of their goal plan.

Both employees and managers can define development activities, either from the development plan itself or through the employee's talent profile, performance review, goal plan and/or career plan.

The development plan lists all activities, regardless of the context where it was added or created. However, when within a specific context, a mini development plan is available to users. This mini plan shows the due date of the activity as well as the status and progress information on top of all the other development activities linked to the selected item.

In addition, collaboration tools are integrated to facilitate social learning. Employees have the possibility to share development activities with others, benefit from a mentoring relationship, and rate and review development content such as courses, books, and coaches.
Working with the Development Plan

Development Plan

The development plan is the fundamental part of the Development Planning functionality and the central location where employees can manage all their development activities.

The development plan is the main location from which each employee can add and remove development activities, edit activity details, maintain the progress status of activities, rate and comment activities, share or recommend activities with others.

Each employee in the system can have a development plan, which is also accessible by the employee's manager, with the same rights as those granted to the employee, as well as to HR administrators with the corresponding permissions.

The development plan can include different types of activities: formal activities such as courses, informal or experiential activities such as a job shadowing assignment, and any other custom-created activity.

The activities are added to the development plan by either searching amongst pre-defined activities in the development library or by creating custom activities, such as job shadowing, mentoring and networking or any other activity not in the development library. Those custom activities that have been created by employees can be shared with other colleagues and will display in their view of the development library.

All actions related to the activities in the development plan are tracked and shown in the History tab.

The development plan is not time-bound and can extend into the future. Therefore, as an example, a development plan can have one development activity that spans three months and another that spans three years. Since the development plan will grow over time, employees will only want to focus on the active items they are working on. Any completed activities can be moved to an archived view of the plan.

Development Plan Approval

The approval of a development plan is an optional process by which the activities composing the development plan are presented to defined users for them to review the development plan activities and to determine if the plan is appropriate. Approval can be done for the entire plan and also when a change occurs in the plan.

The approval of a development plan is determined by the definition of an approval workflow set at the development plan template level. By default, as there is no approval workflow defined, a development plan does not require approval.

However, when the development plan template has an approval workflow, the development plan needs to be approved, based on the approvers selected in the approval workflow and according to their order in the workflow. In addition, email notifications can be sent to the participants at each step of the approval, as per the email templates selected.

The approval process can occur in two different situations, each affected by different settings.

<table>
<thead>
<tr>
<th>Situation</th>
<th>Related Configuration</th>
</tr>
</thead>
<tbody>
<tr>
<td>When the approval of the development plan is requested by the creator of the plan.</td>
<td>When the development plan template has an approval workflow that includes at least one approver, the plan must be approved by the specified approver.</td>
</tr>
<tr>
<td>Situation</td>
<td>Related Configuration</td>
</tr>
<tr>
<td>-----------</td>
<td>------------------------</td>
</tr>
<tr>
<td>When a change is done to an activity in the plan and that change has been configured to require approval if modified.</td>
<td>In the development plan template, the user-defined fields and the standard fields that indicate that the field requires approval will need to go through the defined approval workflow if the said field is edited.</td>
</tr>
</tbody>
</table>

### Printable Development Plan

The development planning feature provides the ability to print development plans.

The printable development plan presents the following sections and fields:

- **Development Plan Information** - General information about the development plan. This section is always part of the printed plan. However, if any of the fields don't have a value, they will display *Not Specified.*

<table>
<thead>
<tr>
<th>Printed Development Plan</th>
<th>Development Plan page</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Section right under Development Plan header</strong></td>
<td><strong>Section - Field</strong></td>
</tr>
<tr>
<td>Status</td>
<td>The status of the plan shows in tool bar, next to the action icons.</td>
</tr>
<tr>
<td>Approval Date</td>
<td>The approval date shows only when the plan has been approved.</td>
</tr>
<tr>
<td>Print Date</td>
<td>No correspondence on development plan; just the current system date.</td>
</tr>
</tbody>
</table>

- **Employee Information** - This section shows general information about the employee. This section is always part of the printed plan. However, if any of the fields don't have a value, they will display *Not Specified.*

<table>
<thead>
<tr>
<th>Employee Information</th>
<th>Field</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Information</td>
<td>Field</td>
<td>The information in this section comes from the employee's user account information</td>
</tr>
<tr>
<td>Employee</td>
<td>Employee's First Name and Last Name</td>
<td></td>
</tr>
<tr>
<td>User Name</td>
<td>User Name</td>
<td></td>
</tr>
<tr>
<td>ID</td>
<td>Employee ID</td>
<td></td>
</tr>
<tr>
<td>Title</td>
<td>Job Role Title or User Title (depending on selected option)</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>Employee Manager</td>
<td></td>
</tr>
<tr>
<td>Organization</td>
<td>Organization</td>
<td></td>
</tr>
</tbody>
</table>
- **Current and Archived Development Activities** - These sections list all current and archived activities, by alphabetical order, when the development plan has at least one current or archived activity. When there are none, this section is not printed at all.

<table>
<thead>
<tr>
<th>Printed Development Plan</th>
<th>Source Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current/Archived Development Activities</td>
<td>Field</td>
</tr>
<tr>
<td><strong>Sub-section on gray background section</strong></td>
<td>Name of the activity</td>
</tr>
<tr>
<td></td>
<td>Status of the activity (in parentheses)</td>
</tr>
<tr>
<td></td>
<td>Description of the activity</td>
</tr>
<tr>
<td></td>
<td>Start Date</td>
</tr>
<tr>
<td></td>
<td>Due Date</td>
</tr>
<tr>
<td><strong>Development Activity Information</strong></td>
<td>Name</td>
</tr>
<tr>
<td></td>
<td>ID</td>
</tr>
<tr>
<td></td>
<td>Category</td>
</tr>
<tr>
<td></td>
<td>Type</td>
</tr>
<tr>
<td></td>
<td>Related Competency</td>
</tr>
<tr>
<td><strong>Measurement</strong></td>
<td>Actual Value</td>
</tr>
<tr>
<td></td>
<td>Target Value</td>
</tr>
<tr>
<td></td>
<td>Stretch Value</td>
</tr>
<tr>
<td></td>
<td>Progress</td>
</tr>
<tr>
<td><strong>Comments</strong></td>
<td>Author</td>
</tr>
<tr>
<td></td>
<td>Date</td>
</tr>
<tr>
<td></td>
<td>Message</td>
</tr>
<tr>
<td><strong>Linked Items</strong></td>
<td>Item</td>
</tr>
</tbody>
</table>
Note that the printed version does not reflect the standard field display of the development plan template. The fields that are part of the printed development plan (indicated in table above) will display even if they are set not to be displayed in the development plan template. For instance, if the Stretch Value field was set to not display in the template, it will still show up in the printed development plan, with a '0' value.

### Viewing a Development Plan

Viewing a development plan allows the user to either view his own development plan, or another employee’s development plan. The plan shows all active development activities, whether these activities are in progress, completed, not started or canceled.

**Prerequisite**

*Performance* > [Quick Links] *My Development Plan*  

*Performance* > [Manager Center] *Development Plan*

If a development plan has never been created, start by creating a plan by clicking *Create*.

**Steps**

1. Click the *Activities* tab to view all the active activities in the plan.  
   To view activities by context, select *View By*, which can organize the activities by competency, employee goal, job role, or review item.
2. Click the *Archived Activities* tab to view all activities archived for that specific plan.
3. Click the *History* tab to view a list of all the actions performed on the development plan.
   Double-clicking the *Date and Time* column displays the event history in a separate message box.

**Next Step**

Once in the *Development Plan* page, you can add new activities, delete or edit activities and view the details of a specific activity in the list.

### Printing a Development Plan

**Prerequisite**

- The setting *Performance* > *Development Planning* > *Enable Development Planning* is set to Yes.
- The setting *Performance* > *Development Planning* > *Enable Development Plan Printing* is set to Yes.
- The user must have the permission *Performance* > *Development Plans* > *View*.
- The development plan contains at least one activity.

**Steps**

1. Access the development plan to print via *Quick Links* > *My Development Plan* or *Manager Center* > *Development Plan*. 

---

**Printed Development Plan**

<table>
<thead>
<tr>
<th>Current/Archived Development Activities</th>
<th>Field</th>
<th>Source Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>is at least one linked item. If none, this sub-section is not printed.</td>
<td>Context</td>
<td>Specifications - Linked Items - Context</td>
</tr>
</tbody>
</table>
2. Once in the development plan, click ☑️ to open the PDF version of the plan.

   Note that there are no printing options to select. The fields that are printed are predefined.
3. To print the development plan, select the printing function of the PDF reader.

Result
The PDF version of the development plan is printed.

Showing/Hiding Development Plan Instructions

Prerequisite
Instructions must have been created in at least one language.

Performance  >  [Quick Links] My Development Plan
Performance  >  [Manager Center] Development Plan

Steps
1. Select More Actions > Show Instructions.

   Show Instructions only displays in the More Actions menu if instructions exist and they are hidden.

   If the instructions are not available in your language, they are displayed in the base language of your system.
2. Click ☑️ to hide instructions.

   Only one set of instructions is available for the entire development plan, regardless of whether you display them within a specific activity.

Adding an Activity to a Development Plan

Adding activities to a development plan is done by searching for an existing activity or by creating a new private activity.

Prerequisite

Performance  >  [Quick Links] My Development Plan
Performance  >  [Manager Center] Development Plan

If a development plan has never been created, start by creating a plan by clicking Create.

The same activity can only be added once in a development plan.

Steps
1. There are three different methods to select and add an activity:
   • In the Development Plan page, click ☑️ and select Search for an activity... to search among the existing activities in the company’s development library and then choose from the Activity Collections in the left pane to see individual activities. Then select Add Activity to add it to a development plan.
   • In the Development Plan page, click ☑️ and select Create an activity... to create a new custom and private activity for yourself.
   • In the Development Plan page, in the left pane menu, click Recommendations and select an activity that was recommended by a peer and then select Accept.
2. If you decide to add the activity to your plan, you will be given the option to link the activity to various items.
   a) In the **Link Development Activity** window, select the desired context from the drop-down list and then select a corresponding item.
   b) Click + to add your selection in the list of selected items.
   c) Repeat the two previous steps for each element you wish to link to your activity.
   d) Once all the linking elements have been selected, click OK.

**Result**
The activity is added to the development plan.

**Removing an Activity from a Development Plan**

Removing an activity deletes it from the development plan.

**Prerequisite**

*Performance > [Quick Links] My Development Plan*

*Performance > [Manager Center] Development Plan*

**Steps**

1. From the **Activities** tab, select the activity you wish to remove.
2. Click 🗑 and select **Remove From Plan**.
3. Confirm the deletion by clicking **Yes**.

**Result**
The selected activity is removed from the development plan.

**Requesting Approval of the Development Plan**

Approval of the development plan is required whenever the related development plan template includes an approval workflow, and when a change is made to the development plan that requires approval.

**Prerequisite**

*Performance > [Quick Links] My Development Plan*

*Performance > [Manager Center] Development Plan*

**Steps**

1. In the **Development Plan** page, click **Request Approval**.
2. Confirm the approval request for it to be sent to the users defined in the approval workflow of the development plan template.

**Result**
The approval request will be sent to the first approver in the approval workflow and will be displayed in that user’s **My Tasks** panel, under the **Approve Development Plan** task type.

**Next Step**
When the approval request is accepted or rejected by the defined approvers, it will be indicated in the user’s development plan; until then, the development plan status will show that the plan is under approval.
Replying to an Approval Request

Whether it be to approve a goal plan, a succession plan, a development plan, a performance review or an employee change request, the approval task to be performed is always brought to the attention of the approver via My Tasks.

**Prerequisite**

An approval must have been requested for the approver be able to accept or reject an approval request.

**Performance > [My Tasks]**

**Steps**

1. In *My Tasks*, from the *Show* list select the appropriate Approve category.
2. In the task list, select an item to display summary information and the corresponding link.
3. Click the link and you are brought either to the specific item page or to a window indicating the employee change requested.
4. Click *Approve* or *Reject*, enter a comment and click *OK*.

**Result**

The approval request is answered and the task is removed from *My Tasks*.
Searching for Development Activities

Development Activity Search

Performing a search allows employees to find suitable activities to add to their development plan.

Searching for a development activity launches the specified query to find the relevant activities, either in the development library or in the activities shared with the employee.

Various types of searches are offered to employees to find activities:

- **Keyword Search** - where the string entered is searched in all activity names and descriptions.
- **Advanced Search** - where the search is performed based on the specified context values.
- **Best Fit Activities** - where the result shows activities that present the same organization, location, job field, job role, job level and competency as the employee performing the search.
- **Top Rated Activities** - where the result shows activities having the highest rating, presented in descending order, from 5 stars to 0.
- **Activities Shared with Me** - where the result shows private activities that have been shared with the current employee by others.
- **Activities Shared with Employee** - where the result shows private activities that have been shared with the employee whose plan is in display.

Searching for an Activity in the Development Library

When searching in the development library for an activity, activities that were created by the company and that are available to all users are searched.

**Prerequisite**

*Performance > [Quick Links] My Development Plan*

*Performance > [Manager Center] Development Plan*

If a development plan has never been created, start by creating a plan by clicking *Create*.

**Steps**

1. In the *Development Plan* page, click + and select *Search for an activity*... to search among the existing activities in the company's development library.

2. In the *Development Activity Search* panel, perform your search using the keyword search, the advanced search or from the Activity Collections.

   The activities corresponding to your search criteria will display.

3. If you find an activity of interest and want to add it to your plan, click *Add Activity*.

   • If you want to know more about the activity before adding it, click the activity name to view its details.

4. If you decide to add the activity to your plan, you will be offered the possibility to link the activity to various items.

   a) In the *Link Development Activity* window, select the desired context from the drop-down list and then select a corresponding item.

   b) Click + to add your selection in the list of selected items.
c) Repeat the two previous steps for each element you wish to link to your activity.
d) Once all the linking elements have been selected, click **OK**.

### Result
The activity is added to the development plan.

### Next Step
If you want to provide additional information about the activity or edit the existing information, select the activity to view its details and make your modifications as needed on the Development Activity Information page.

### Searching an Activity Using Keywords
Performing a keyword search allows the user to search either in the development library or in the activities shared with the employee for entire or partial words where the string entered is searched in all activity names and descriptions.

#### Prerequisite
*Performance > [Quick Links] My Development Plan*

*Performance > [Manager Center] Development Plan*

If a development plan has never been created, start by creating a plan by clicking **Create**.

#### Steps
1. In the Development Plan page, click **+** and select **Search for an activity**... to search among the existing activities in the company's development library.
2. In the Development Activity Search page, perform your search by entering text in the **Keyword** search box.

   You can enter any of the following types of information, depending on what you are searching for:
   - **Text string** - Enter an entire word or just a part of a word to search for all occurrences of that word or word stem. For example, if you entered **manage**, the result list would include all occurrences of **manage** including words such as **manage**, **management**, **manager**, **manages**, etc.
   - **Exact match** - Enter the exact string that you are looking for, in quotation marks. Example: You would enter **“sales manager”** to search for elements that include that specific string.
   - **Multiple words and/or word stems** - Enter a combination of words, separated by a space, to search for elements that contain all the words. For example, you would enter **manage direct** to search for elements that contain both the words that begin with **manage** and the words that begin with **direct**.
   - **One string or another** - Enter multiple words separated by the boolean operator **OR** to search for results that contain any of the words. The operator OR must be entered in uppercase. For example, enter **manager OR director OR sales** to search for elements that include at least one of the words. The search results might contain elements that have more than one of the words.
3. Click **Launch the search**.

   The system searches for the text string in the names and descriptions of the activities in the development library or in the activities shared with the user.

### Result
The activities corresponding to your search criteria will display.
Next Step
From the result list, you can add any of the activities to the development plan.

Searching an Activity Using Advanced Search Options
The advanced search provides the ability to search for activities based on specified context values.

Prerequisite
Performance > [Quick Links] My Development Plan
Performance > [Manager Center] Development Plan

If a development plan has never been created, start by creating a plan by clicking Create.

Steps
1. In the Development Plan page, click and select Search for an activity... to search among the existing activities in the company's development library.
2. In the Development Activity Search page, click the Advanced Search.
3. In the Advanced Search window, check the fields to be searched.

As the window keeps the values of the previous search, it is suggested to click Reset to remove all criteria. You can click Customize to select which search criteria to use.

Depending on the type of field, two selection types are possible:
- Selection from a drop-down list of pre-defined values
- Selection in a corresponding selector window, accessed by clicking.

The only exception being the field Name, which works the same way as the keyword search.
4. If you want the search results to take into account activities for which no specific context has been defined, select Show activities not contextualized.

If this option is checked, along with specified values in some fields, the search results will show activities that have the specified values as well as those that have no value specified.

For example, if this option is checked and you selected New York in the Location field, the resulting activities will either have New York as a specified location context or have no value at all for the location context.
5. Click Search.

Result
The activities corresponding to your search criteria display.

Next Step
From the result list, you can add any of the found activities to the development plan.

Searching an Activity Among Best Fit Activities
Searching an activity among best fit activities provides the ability to find activities that present the same organization, location, job field, job role, job level and competency as the employee performing the search.

Prerequisite
Performance > [Quick Links] My Development Plan
**Performance > [Manager Center] Development Plan**

If a development plan has never been created, start by creating a plan by clicking *Create*.

**Steps**

1. In the *Development Plan* page, click + and select *Search for an activity...* to search among the existing activities in the company's development library.
2. In the Activity Collections panel, click *Best Fit Activities*.

**Result**
The activities that most closely match your competencies display.

**Next Step**
From the result list, you can add any of the found activities to the development plan.

**Searching an Activity Among Top Rated Activities**

Searching an activity among top rated activities provides the ability to find activities that have been rated by others and that show the highest rating, listed in descending order, from 5 stars to 0.

**Prerequisite**
This search option is

*Performance > [Quick Links] My Development Plan*

*Performance > [Manager Center] Development Plan*

If a development plan has never been created, start by creating a plan by clicking *Create*.

**Steps**

1. In the *Development Plan* page, click + and select *Search for an activity...* to search among the existing activities in the company's development library.
2. In the Activity Collections panel, click *Top Rated Activities*.

**Result**
The activities corresponding to your search criteria display.

**Next Step**
From the result list, you can add any of the found activities to the development plan.

**Searching an Activity Among Activities Shared With Me**

Searching an activity among the activities shared with me allows the current user to view the custom and private activities created by other users and shared with him or her. If the current user is viewing his/her own development plan, these activities are those that are shared specifically with him or her. If the current user is manager and is viewing another user's development plan, these activities will be those that are shared with him or her, not with the person who's plan is in display.

**Prerequisite**

*Performance > [Quick Links] My Development Plan*

*Performance > [Manager Center] Development Plan*
If a development plan has never been created, start by creating a plan by clicking *Create*.

**Steps**

1. In the *Development Plan* page, click + and select *Search for an activity...* to search among the existing activities in the company's development library.
2. In the Activity Collections panel, click *Activities Shared With Me*.

**Result**

The activities corresponding to your search criteria display.

**Next Step**

From the result list, you can add any of the found activities to the development plan.

### Searching an Activity Among Activities Shared With the Employee

Searching an activity among the activities shared with the employee allows the current user to view the custom and private activities created by other users and shared with the employee whose plan is in display.

**Prerequisite**

*Performance > [Quick Links] My Development Plan*

*Performance > [Manager Center] Development Plan*

If a development plan has never been created, start by creating a plan by clicking *Create*.

**Steps**

1. In the *Development Plan* page, click + and select *Search for an activity...* to search among the existing activities in the company's development library.
2. In the Activity Collections panel, click *Activities Shared With Employee*.

**Result**

The activities corresponding to your search criteria display.

**Next Step**

From the result list, you can add any of the found activities to the development plan.
Working with Development Activities

Development Activity

A development activity is any activity that can contribute to improve the capability of an employee to perform in his/her current job and his/her potential to perform future roles.

Development activities can take various forms:

• activities defined by the company, which are considered to be public and made available from the development library;
• custom activities created by employees themselves, which are considered private and can only be made available to other employees if shared.

Development activities are added to an employee's development plan by the employee himself or assigned by the employee's manager, by searching amongst the pre-defined public activities in the development library or by creating new custom private activities.

When adding an activity to the development plan, the user can provide various information about the activity, link the activity to a specific context, such as a goal, a review item, a competency or skill or even to a job role to indicate the purpose of the activity, indicate how the progress will be measured and archive the activity.

Details about a development activity can be seen from the development plan itself as well as from the mini plan, accessible via multiple contexts in the application. The Development Activity Details page shows the name, description, status and dates of the activity, lists the items that are linked to the activity and displays measurement information and other activity information, based on the type of activity.

Since development plans are not time-bound and may contain activities that can span any duration, the employees have the possibility to archive development activities that are completed or that they do not want to have displayed in their active development plan view. Archived development activities can be accessed at any time through the Archived Development Activities view.

Third-Party Development Activity Provider Support

Taleo increases the flexibility for customers to have a robust and comprehensive development activity library with each implementation, by adding third-party provider support.

This feature provides Taleo with the ability to partner with development plan providers and offer a wider range of development activities to Taleo customers.

When a third-party development activity library has been associated with the system, it can be enabled by Taleo Customer Support in the configuration module. Once enabled, system administrators can configure individual development activities within the library to be displayed or hidden. Administrators can create and delete custom development categories and activities for a specific system, but can only enable, disable and edit those supplied by a third-party vendor.

Employees can use their own internal development activities and those from external providers in the same system. When a user searches for an activity, a provider column is included in the activity list, enabling the user to quickly identify the source of the development activity.
Viewing Details About a Development Activity

Viewing details about a development activity allows the user to see all the information provided for an activity, such as the activity’s specifications (start and end dates, status, linked items), the activity’s progress and even an history of all related events. Such information can be viewed for activities that are part of a development plan or archived activities.

**Prerequisite**

*Performance > [Quick Links] My Development Plan*

*Performance > [Manager Center] Development Plan*

If a development plan has never been created, start by creating a plan by clicking *Create*.

**Steps**

From the Activities tab in the Development Plan, click the activity you want to view.

**Result**

The *Development Activity Details* are displayed and shows all the information that was provided about the activity.

**Next Step**

You can click the left button to return to the *Activities* tab or click the arrows to page through the other activities in the development plan.

Contextual Development Activities

While development activities are always listed in a development plan, they can be created in, and associated with, other modules.

Linking an activity to a specific context enables activities to be associated with talent profile competencies, goal plans, career plans and performance reviews. The context is established when creating the activity within the module or linking it via the development plan module afterwards.

By default, when you create an activity in a module it is linked to that module. You can select to change the context in the *Create a Development Activity* dialog, however, as one of the steps during the creation process of by using the *Link* action menu option in the development activities list.

Creating Development Activities outside a Development Plan

**Prerequisite**

The corresponding Manager Center modules can also be used.

*Performance > [Quick Links] My Profile > Competencies > Development Activities*

*Performance > [Quick Links] My Career Plan > Step 1 and greater*

**Steps**

1. Click *Create an activity*.
2. Enter the required values and click *Next*.
3. Click *OK* to accept the default activity linking - or - proceed to the next step to customize.
4. Select from the available custom and system contexts and add them to the list.
   Multiple context types can be associated with each activity.
5. Click OK.

**Result**
The development activity is linked to the selected items and added the user's development plan.

**Creating a Private Activity**
Creating an activity is done to add a custom and private activity to an employee's development plan, that is an activity other than from the development library.

**Prerequisite**
- Performance > [Quick Links] My Development Plan
- Performance > [Manager Center] Development Plan

If a development plan has never been created, start by creating a plan by clicking Create.

**Steps**
1. In the Development Plan page, click and select Create an activity... to create a new custom and private activity for yourself.
2. In the Create a Development Activity window, enter a name and a description for your activity and any other desired information.
   The Name field is limited to 200 characters and the Description field is limited to 1000 characters.
3. If custom categories have been defined, you'll have the option to assign a category to the activity.
4. Click Next.
5. Select the items to which you want to link your activity by first selecting the context and then the specific related item in the list of available items.
   Note that you can add multiple items, but each must be selected and added one by one.
   If you select a custom context, you have the ability to add new contexts right from this window by clicking Create custom context.
6. Click to add your selection in the list of selected items.
7. Click OK.

**Result**
The newly created activity is added to the development plan.

**Next Step**
If you want to provide additional information about the activity, select the activity to view its details and make your modifications as needed on the Development Activity Details page.

**Linking an Existing Activity to a Specific Context**

**Prerequisite**
- Performance > [Quick Links] My Development Plan
- Performance > [Manager Center] Development Plan
If a development plan has never been created, start by creating a plan by clicking *Create*.

**Steps**

1. From the *Activities* tab, click ➔ and select *Link...* for the required activity.
2. In the *Link Development Activity* window, select the items to which you want to link your activity by first selecting the context and then the specific related item in the list of available items.
   
   Available job roles depends on how many different job roles have been added to the employee's career plan.

   You can add multiple items, but each must be selected and added one by one.

   If you select a custom context, you have the ability to add new contexts right from this window by clicking *Create custom context*.
3. Click ➔ to add your selection in the list of selected items.
4. Click *OK*.

**Result**

The activity is linked to the selected items. Linked activities can be viewed by their context in the *Development Plan* page.

### Archiving an Activity

Archiving a development activity is done to remove an activity from the development plan without deleting it, therefore allowing the user to keep it for future reference, whether it be to recommend or share it with someone else or to view its details once the activity is completed.

**Prerequisite**

*Performance ➔ [Quick Links] My Development Plan*

*Performance ➔ [Manager Center] Development Plan*

**Steps**

1. From the *Activities* tab, click on the activity that you wish to archive.
2. From *More Actions*, select *Archive...*.
3. In the *Archive a Development Activity* window, rate and comment on the activity and click *Finish*.
   
   • Note you cannot rate, share, or add comments to a Taleo Learn activity.

**Result**

The activity is removed for the active development plan and is available via the *Archived Activities* tab.

**Next Step**

Archived activities can be recommended or shared, depending on whether the activity is created by the user or taken from the development library, but cannot be reinserted in the development plan. Once archived they cannot be un-archived.

### Sharing an Activity

Sharing an activity allows the user to share a custom activity that he/she has created with another user.

**Prerequisite**

*Performance ➔ [Quick Links] My Development Plan*
**Performance > [Manager Center] Development Plan**

For a custom activity to be shared, it needs to be archived first.

**Steps**

1. If the activity is not archived, from the Activities tab click the activity:
   a) Select More Actions > Archive...
   b) In the Archive a Development Activity window, choose to share the activity with your fellow employees as part of the archiving process by selecting Next.
   c) Select the employees that you want to share the activity with and click Finish.
2. If the activity is archived, select the Archived Activities tab and click the activity.
3. In the Development Activity Details page, click Share.
4. In the Share a Development Activity, select the employees with whom you wish to share the activity by first selecting the source and then the employees in the list of available employees.
   
   Note that you can add multiple employees, but each must be selected and added one by one.
5. Click to add your selection in the list of selected items.
6. Click Finish.

**Next Step**

Note you cannot share Taleo Learn activities.

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**Recommending an Activity**

Recommending an activity allows the user to suggest to another user an activity taken from the development library, whether the activity is part of his current development plan, archived or just in the result list of an activity search operation.

**Prerequisite**

*Performance > [Quick Links] My Development Plan*
*Performance > [Manager Center] Development Plan*

Only activities that are part of the development library can be recommended.

**Steps**

1. From the Activities or Archived Activities tab, click an activity and then select More Actions > Recommend...
   
   You can also select and Recommend... for an activity from the Development Activity Search results list.
2. In the Recommend a Development Activity window, select the employees to whom you wish to recommend the activity by first selecting the source and then the employees in the available list.
3. Click to add your selection to the list of selected items.
4. Add comments and click Finish.

Since the same activity can only be recommended once to the same employee, if an employee cannot have the activity recommended to them, a message is displayed explaining why.

**Result**

The activity is recommended to the selected employees and will be displayed in the Recommendations of each selected employee, who will have the choice of accepting or declining the recommendation.
Development Activity Comments

You can create, edit and delete comments for an employee's development activity.

Comments can be left on development activities by line managers and employees. Comments are viewable by anyone who has access to the activity; however, the actions that can be taken on a comment are dependent on its owner. Only the owner of the comment can edit or delete it.

Commenting on Development Activities

Prerequisite

*Performance > [Manager Center] Development Plan*

*Performance > [Quick Links] My Development Plan*

Steps

1. From the Activities tab, click an activity.
2. Click Add in the Comments section and enter text.
3. Click Done and then click .

Viewing Recommended Activities

Viewing recommended activities allows the user to see all the development library activities that have been recommended by others, either to him if viewing his own plan or to the employee whose plan is in display.

Prerequisite

*Performance > [Quick Links] My Development Plan*

*Performance > [Manager Center] Development Plan*

If a development plan has never been created, you won't be able to see the left pane Menu box and you'll need to start by creating a plan by clicking Create.

Steps

1. Select Recommendations from the left pane.
   All the activities recommended to the employee are listed and show the information about the activity, as well as the rating and comment from the person who recommended the activity.
2. You can choose to add the activity to the development plan by clicking Accept; otherwise, you can select Decline to remove the activity from the recommendations.

Next Step

Recommended activities can be accepted or declined.

Viewing Archived Activities

Viewing archived activities allows the user to see all the activities that have been removed for the active development plan to be placed in an archive for later use.

Prerequisite

*Performance > [Quick Links] My Development Plan*
Performance > [Manager Center] Development Plan

If a development plan has never been created, you won't be able to see the left pane Menu box and you'll need to start by creating a plan by clicking Create.

Steps
From the Archived Activities tab, click an activity.

Next Step
Archived activities can be recommended, assigned, and shared, depending on user permissions and whether the activity is created by the user or taken from the development library. Activities cannot be reinserted in the development plan.

Rating an Activity

Rating an activity allows the user to provide his appreciation of a completed activity and is performed as part of the archiving process.

Prerequisite

Assigning an Activity to a Direct Report

Assigning an activity allows a manager to quickly add an activity to the development plan of one or multiple direct reports at once, whether the activity is in his own development plan or in the development plan of a direct report.

Steps
From the Activities tab, select the activity that you want to assign to other employees.

Performance > [Quick Links] My Development Plan

Performance > [Quick Links] My Development Plan

Steps
1. In the Activities tab, click the activity that you wish to archive and rate.
2. Select More Actions > Archive...
3. In the Archive a Development Activity window, rate the activity using the stars and provide a comment.
4. Click Finish.

Result
The activity is archived, along with its rating and comment.

Next Step
Archived activities can be recommended or shared, depending on whether the activity is created by the user or taken from the development library, but cannot be reinserted in the development plan.

Note that you cannot rate Taleo Learn activities.
You must not click the activity link, but select the activity so that it is highlighted.

2. Click and in the *Activity Assignment* window, select the direct reports you want to assign the selected activity to, by placing a check beside the name.

Since you can assign an activity to a maximum of ten direct reports at once, you might need to repeat the assignment process if you have more direct reports to whom to assign the activity.

3. Click *OK*.

Note that an activity cannot be assigned to an employee whose development plan already includes the activity or if the plan is under approval. An activity might also not be assignable if the development plan of the selected employee has not yet been created or is already approved; both of which depend on the assignment settings defined in the development plan template.

**Result**

If the activity is assigned successfully, the selected employees will see the assigned activity in their development plan.

If the activity could not be assigned, a window will display the employee for whom it didn't work and the reason.
Working with Mentoring

Mentoring

Part of Development Planning, the mentoring functionality allows for formal mentor or development coach relationships to be created in the system.

Many organizations have some form of mentoring program in place since it is an excellent way to preserve organizational knowledge.

When a mentoring relationship is established and upon configuration of the proper mentoring settings, the system affords the mentor special access to view information about the mentee, such as the mentee's career or development plan. This access facilitates the dialog between the mentor and mentee, which can be captured by the system in the form of feedback tracking meetings, discussions, follow-ups and words of wisdom that the two parties might exchange.

Example:

Julia may want to move from her current job function in Marketing to a new job function in Sales. Her manager is a logical choice to mentor her in her current role, but he isn't necessarily the best person to mentor her to make the job change across functions. Therefore, she could benefit from a mentor who would be well-suited to help her achieve her career goal. Her manager can assign a suitable mentor for her.

Assigning a Mentor

A mentor is assigned when a manager requests a mentor for one of his reports, which automatically establishes the mentoring relationship between the selected mentor and mentee.

Prerequisite

The mentoring feature must be enabled and the related user type permissions granted.

Performance > [Manager Center] Organization Chart

Steps

1. Locate the employee to whom you want to assign a mentor and click on the employee's performance card to select Request Mentoring...
2. In the Request Mentoring window, click in the contact category to select appropriate category and then select the employee you wish to assign as a mentor.
3. Provide a comment, as it is mandatory.
4. Click Send for the request to be sent to the selected mentor.

Result

The mentor request is sent to the selected mentor and the mentee is added to the mentor's Mentoring Center.
Accessing the Mentoring Center

The Mentoring Center is accessed to view all the mentoring relations of an employee and to maintain those relationships.

**Prerequisite**

The mentoring feature must be enabled and the related user type permissions granted.

**Performance** > [Quick Links] My Mentoring Center

**Steps**

Once in the Mentoring Center page, you can see all the mentees that have been assigned to you.

**Next Step**

You can maintain the relationship and send feedback to a mentee or break the mentoring relationship.

Writing to a Mentee

Writing to a mentee allows a mentor to send his/her mentee feedback about his/her development plan activities.

**Prerequisite**

**Performance** > [Quick Links] My Mentoring Center

**Steps**

1. In the Mentoring Center page, locate the mentee to whom you want to write.
2. In the information box, click Send Feedback.
3. In the Provide Feedback dialog enter your feedback in the text box and format the text as needed.
   - The text entry area allows for a maximum 6,000 characters. A counter lets you know how many characters you have left or are over the limit. Once you have reached the limit you can continue typing and editing, but the system will not allow you to save if the count is over the limit.
4. Optional. In the Approval section you can select an approver, if desired.
5. When input is complete, click Send.

**Result**

The mentee and/or the manager of the mentee will receive the message in their Feedback Journal, with the General subject.

Reading Feedback Provided by a Mentor

All feedback comments provided by the mentor to the mentee can be read by the mentee from his/her journal and is treated as unsolicited feedback.

**Prerequisite**

**Performance** > [Quick Links] Feedback Journal

**Steps**

1. On the Feedback page, select the Received tab at the top of the results list.
   - The results list displays feedback received about yourself, solicited or unsolicited; pending requests for feedback about yourself (requested by yourself or someone else); and requests for feedback about yourself (requested by yourself or someone else) that are pending approval.
2. To only see feedback that a specific mentor has sent, you can select this person’s name in the About filter. You can also choose to sort the feedback by the column Subject and locate and read all the General ones.

Ending a Mentoring Relationship

The established mentoring relationship can be ended by the mentor at any time.

Prerequisite

Performance > [Quick Links] My Mentoring Center

Steps

1. In the Mentoring Center page, locate the mentee for whom you want to end the mentoring relationship.
2. In the information box, click to remove the mentee from your Mentoring Center.

Result

The mentee is automatically deleted from the Mentoring Center and the mentoring relationship is terminated.
Working with Learning Management Systems

Learn Integration

Taleo Learn and Taleo Development have been unified to provide users a singular view of their total learning and development activities. This combines the strengths of both products to provide a total learning and development solution for users.

This feature was only available for sales demonstration purposes in Taleo Performance 12A.5. It has now been made generally available in 12B.

The integration of Taleo Development and Taleo Learn provides multiple methods for populating a given employee's development plan:

- Taleo Learn administrators can assign learning activities to employees based on criteria such as, their job, department, or location
- Employees can search the Learn item catalog and self-register for development activities, enabling employees to be actively engaged in their professional development process
- Employees can create custom activities, such as on-the-job learning, mentorships, and other company initiatives on an ad-hoc basis

Taleo Learn supports multiple types of learning items, approvals and enrollment for those learning items. This increases the options available for the type of development activities that can be added to someone's development plan.

Learn items can be added as independent development activities and added to a custom context. Items that require enrollment or approval can be added and their processing will be handled within the Taleo LearnCenter.

When a Learn item is added to an employee's development plan, its details are saved as a development activity in Taleo Performance. This enables the details of the Learn item to be included in reports and when printing. When a Learn item is updated in the LearnCenter, this update will be relayed to Taleo Performance, so that the data in the development plan accurately reflects the current state of the Learn item.

After adding Learn items to a development plan, any actions or updates that affect the progress or details of a Learn item occur within the LearnCenter. This includes actions such as, approvals and enrollment, and updating completion status and scores. Within the development plan you can comment on the Learn item, link it to a context, and view its history.

Once a Learn item is completed it can then be archived. You cannot share, rate, or enter additional comments for Taleo Learn activities when archiving them. Rating and sharing is done within Taleo Learn.

For details on Taleo Learn, see their Online Help.

Working with Taleo Learn Items

Taleo Learn items can consist of Instructor Lead Training (ILT) sessions, Virtual Instructor Lead Training (VILT) sessions, online e-learning courses, course enrollments and more.

When working with these items in Taleo Performance, you can search for and view them, add them to your development plan, later review item changes or progress, and archive them.

- Adding Learn Items to a Development Plan
- Viewing Learn Items
Adding Learn Items

When your system is using Taleo Learn as the Development Activity Library, you can select Learn items as your development activities.

When searching for Learn items to add, you can filter by category and keyword. Keywords search Learn item names and descriptions. Categories can be thought of as folders in which you keep related items. Categories help manage various Taleo Learn items, such as enrollments, ILT sessions, classes, assignments, assessment-related items, skills, and job profiles.

You can add Learn items from development plans, goal plans, performance reviews, career plans, and the talent profile.

To add Taleo Learn Items

**Prerequisite**

A development plan must exist.

[Quick Links] My Development Plan

**Steps**

1. Click and select *Search for an activity*.
   
   By default, the Development Activity Search list displays all the Learn items in the library.

2. Enter search criteria and select a category and click *Search*.
   
   The categories available are dependent on your implementation.

3. Hover over an item and click ⏳ and select *View details* for the item you want to add.

4. Review the item and click *Add to plan*.

5. In the Link Development Activity window select the context for the activity.

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competency</td>
<td>Lists the competencies you have in your talent profile.</td>
</tr>
<tr>
<td>Employee Goal</td>
<td>Lists all of your goals that are not started or in progress.</td>
</tr>
<tr>
<td>Job Role</td>
<td>Lists the job roles for each scenario in your career plan.</td>
</tr>
<tr>
<td>Review Item</td>
<td>Lists all the review items that are included with your performance reviews.</td>
</tr>
<tr>
<td>Custom Context</td>
<td>These values are created by users and enables you to group together development activities in a manner that is meaningful to your organization.</td>
</tr>
</tbody>
</table>

You can link multiple items, but each must be selected and added one at a time.

6. Click *OK*.

**Result**

The item is added to your development plan as an activity.
Completing Learn Items

You can use the Launch this Activity link from within a development activity, to access the Learn item and work on completing it.

Once launched, the activity is displayed in a new window. What you can do from that window is dependent on the type of Learn item it is. For instance, if it is a web-based course you can complete it directly within that window, whereas if it is a director-led classroom course you may only be able to update your progress. Regardless of the type, as you complete the Learn item you progress is updated accordingly in Taleo Performance.

To launch an activity

Prerequisite

A development plan must exist.

[Quick Links] My Development Plan

Steps

1. Select the development activity name.
2. Click Launch this activity.
   A new browser window opens to display the activity.
3. Work on the activity as needed and close the window.
   Progress is updated, indicating how much of the activity has been completed. How these are completed is dependent on their type.
4. Click Add in the Comments section if additional information needs to be added.
   This comment is added to the Learn item in Taleo Performance and is not associated with the item in Taleo Learn.
5. Click .

Result

When all the components of the activity have been completed, it will have a Status of Complete.

Viewing Learn Items

You can view Learn items to preview them before adding them to your development plan, or to review changes made to an item that is already part of your development plan.

When a field is not used by a Learn item, N/A is displayed. If there is an empty field that means it may be used, but currently has no value.

When looking at Employees' Reviews, only reviews that were entered for the Learn item in Taleo LearnCenter are available.

To View Learn items

Prerequisite

A development plan must exist.

[Quick Links] My Development Plan

[Quick Links] My Development Plan > Development Activity Search Results
Steps

1. Hover over an item and click and select View details.

   The most current information on the item is displayed.

2. Click Preview this event to open a new window from where you can view additional details on the components that make up the activity.

   This may not be available for all items. You can preview an e-Learning course without it counting against the completion of that course.

3. Use Sort By in the Employees' Reviews section to filter reviews from LearnCenter users for the item.

Next Step

Click to return to the development activities or if you are viewing the item while searching, click Add to plan.

Archiving Learn Items

Development activities based on Learn items can be archived, but there are some differences from a standard activity.

Archiving a Learn item helps limit the list of development activities in Taleo Performance to current activities. It does not impact the item in the Taleo LearnCenter. You cannot share, rate, or enter additional comments for Taleo Learn activities when archiving them, unlike a custom activity.

If there are any updates or changes to a Learn item that has been archived, it is unarchived and returned to the Activities list. This can include changes such as, when a recurring item reaches its recurrence date, a change in the description, or anything else that alters the item's content.

Integration with Learning Management Systems

Via Taleo Connect Client, customers are able to import data into an employee's development plan, as well as export data out. More importantly, they can synchronize development activities with an external system.

Taleo offers, via Taleo Connect Client (TCC), import and export services for Development Plan and Development Goal entities.

Development activities can also be contextualized using Taleo Connect Client. Previously, courses and other items could be loaded into the Development Library using TCC. However, if a client customer wanted to tie that course to a competency, OLF, or job level, they had to do so in Taleo Performance Administration - now, this association can be done via Taleo Connect Client.

For example, clients use an LMS to track and manage courses. Employees have the course in a plan on the LMS. They may also want to track that course on Taleo's development plan. The new TCC capability would allow the customer to build an integration that maps an activity in the external LMS to the course on the employee's development plan in Taleo so that fields like status and progress can be synchronized. With this process, employees don't have to remember to update the course information in both systems.

These integration services provide the ability to perform the following actions:

- Ability to create a development activity on an employee's development plan using TCC by populating a number of different fields.
- Ability to export the content of an employee's development activity from a development plan using TCC (employee ID, development activity name, description, start and end dates, status, progress, etc.)
- Ability to update fields on a development activity via TCC (status, progress, description, etc.)
Accessing a Third Party Training Course

**Prerequisite**

Your Taleo Performance system must be integrated with a third party Learning Management System (LMS).

You must have the required Development Plan and Learning user type permissions.

*Performance > [Quick Links] My Learning*

**Steps**

Click the provider name.

**Result**

A new window is displayed, presenting the learning environment. If a password is required it will be your Taleo password.
Talent Pools

- Using Talent Pools .............................................................. 248
- Talent Pool Housekeeping .................................................. 258
Using Talent Pools

A talent pool enables your organization to designate a pool of employees and candidates for analysis and calibration. Talent pools facilitate collaboration between your organization's HR team and stakeholders of functions such as succession plans and workforce planning.

Talent pools provide the ability to increase the scope of succession planning by working independently with performance matrices outside of that module. By associating a job role with a talent pool, it enables an organization to create and foster a pool of employees with the potential to act as successors for multiple positions across the company, instead of being focused on a specific position.

For this, you need the following:

- **Defining Your Talent Pool**
- **Populating Your Talent Pool**
- **Filtering Your Talent Pool**
- **Evaluating Members using a Matrix**
- **Evaluating Members using Charts**
- **Assigning Development Activities to Pool Members**

Defining Your Talent Pool

You must define your talent pool before you can begin working with it. This involves creating a talent pool, assigning users to collaborate on it and, in instances where it can be used for succession planning, designating its context.

The key components are:

- The owner, who by default is the person creating the pool. The pool owner is the only user that can edit the name, description, owner and context. Only owners can add collaborators.
- Pool context identifies its purpose. Selecting position means the pool can be used for succession planning for that specific position, belonging to a specific employee. Job role can also be used for succession planning, but by increasing the scope to that level it enables multiple positions to be targeted. This helps avoid creating redundant pools with duplicate resources. Selecting none enables the pool to be used for purposes outside of succession planning.
- Collaborators are the users who work with the pools. They can add pool members, rank members by moving them to different matrix cells and assign development activities. It is important the collaborators have the required user permissions to access the details of pool members.

To define your talent pool

**Prerequisite**

[Quick Links] Talent Pools

**Steps**

1. Click to display the New Talent Pool window.
2. Enter a mandatory name and a brief description.
3. Select an owner and pool context, by using the selector window if required.
   - Pool context can initially be left as None and changed to a Job Role or Position later.
4. Click Next to display the Users list page.
5. Click to choose the users who will have access and be able to collaborate on the talent pool, and click Select.

6. Click OK to save the talent pool and display the Members tab.

**Next Step**

Members can now be added to the talent pool.

**Talent Pools Comment Support**

Users can provide comments when performing Talent Pool activities. Comments provide justification and context so when users return to the transactions at a later date, they have a historical record of why decisions were made and what discussions took place.

Characteristics of comments in Talent Pools:

- Comments are not mandatory.
- If the Comment dialog is left blank then no comment instance is created or tracked.
- Add Comment dialogs have text areas that can take a maximum of 6000 characters.
- Comments can be added, edited and deleted.
- A single comment may be directed to multiple people selected from a list at the same time.

When adding members to a Talent Pool either via the People Selector or the Advanced Search, users are presented with a Comment dialog box that gives them the opportunity to add a comment as they add the member to the Talent Pool. Adding a comment is not mandatory, so if one is not desired, users can leave the comment blank and select *Cancel* to add the member without a comment.

Users will also be prompted to enter a comment when they remove a member from a Talent Pool. In this case, the pop-up is both a "second chance" confirmation to be certain a users intent was to remove the member, as well as an opportunity to enter a comment.

All comments that are entered for this member are stored in the memory. In the future, should this member be added to the Talent Pool again, all the comments prior to the removal will be restored for this member.

A comment is optional; click *Yes* without entering a comment and the member will be removed from the Talent Pool.
Methods for Entering Comments

- Adding Comments Using the Contextualized Menu

<table>
<thead>
<tr>
<th>Add a Comment about a Member within a Talent Pool...</th>
<th>Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>When you use the View available actions contextual selector</td>
<td>[Quick Links] &gt; Talent Pools &gt; (select Talent Pool &gt; (highlight member) &gt; View available actions &gt; Add Comment &gt; Add Comment dialog</td>
</tr>
</tbody>
</table>

- Adding Comments Using the Toolbar More Actions Menu

Using this option allows users to add a single comment to multiple members at the same time.
### Add a Comment about a Member within a Talent Pool...

When you use the More Actions toolbar menu

**Navigation**

[Quick Links] > Talent Pools > (select Talent Pool > (select member(s)) > More Actions > Add Comment > Add Comment dialog

---

### Navigation

**Talent Pool**

Add Comment Nomination Talent Pool

<table>
<thead>
<tr>
<th>Type</th>
<th>Name</th>
<th>Job Title</th>
<th>Review Rating</th>
<th>Risk of Loss</th>
<th>Potential</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Jonathan Dalesman</td>
<td>Sr. Director, Planning &amp; Processes</td>
<td>N/A</td>
<td>Medium</td>
<td>Low</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td>Constance Lewis</td>
<td>Research Analyst</td>
<td>4.0</td>
<td>Medium</td>
<td>Low</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td>Tonya Murphy</td>
<td>Sr. Market Research Analyst</td>
<td>N/A</td>
<td>High</td>
<td>High</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td>Cheryl Peterson</td>
<td>Market Research Analyst</td>
<td>N/A</td>
<td>Medium</td>
<td>Medium</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td>Angel Sanchez</td>
<td>Director, Market Research</td>
<td>4.0</td>
<td>Medium</td>
<td>Low</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td>John Seaverd</td>
<td>Senior Director, Territory Operations</td>
<td>N/A</td>
<td>Low</td>
<td>High</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td>Brittany Smith</td>
<td>Research Analyst</td>
<td>2.0</td>
<td>Low</td>
<td>Medium</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td>Henry Stevenson</td>
<td>Director, Facilities Research</td>
<td>3.0</td>
<td>Medium</td>
<td>High</td>
<td>-</td>
</tr>
</tbody>
</table>

- Adding General Comments about the Talent Pool as a Whole

When a comment is added using this method, it is always applied to the Talent Pool as a group, not to an individual. This is true even if one or more individuals is selected in the Talent Pool.

### Add a Comment about an entire Talent Pool...

**Navigation**

[Quick Links] > Talent Pools > (select a Talent Pool) > Add Comment > Comment Dialog

---

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View Recent Comments Pop-up and Editing and Deleting Comments

In the Comment column on the Talent Pool, there's an actionable indicator that displays the number of comments associated to each member.

Once View recent comments is clicked, a pop-up displays with all the comments for that successor. Scrolling is enabled if there are many comments. If there are more than 10 comments, the View More Comments link displays. Once this link is clicked, scrolling is enabled and users are able to view all of the comments by scrolling. Clicking the pencil icon brings up the options to edit or delete any or all of the existing comments. Notice that possible misspellings are underlined in red.
Users are only able to edit or delete the comments that they own/authored. The pencil icon only displays next to those comments that are editable by the logged in user.

Comment History Tracking

Every time a comment is added, edited or deleted, the event is recorded in the History.
Populating Your Talent Pool

Collaborators and owners add employees and candidates to talent pools, who are then known as pool members. Pools can be populated using the employee selector or by using advanced search:

- Adding pool members uses the employee selector to search through direct reports, network and keywords. This method is best for smaller pools where the collaborators have first-hand knowledge of prospective pool members.
- Advanced search uses Talent Search criteria to focus on pool members that fit specific parameters. This is most useful when the group of prospective members is too large for the collaborators to search through without filtering.

To add pool members

**Prerequisite**

[Quick Links] Talent Pools > Members

**Steps**

1. Click and select Add Members.

2. Select Search in my employees to find members by drilling down through your direct and indirect reports and delegated employees, or Search in my network, or Search by keywords to search either employees or candidates.

   Keyword search checks username, first name, middle initial, last name, and email address fields. You can select Extended Search to enable fields in the employee's talent profile and additional fields associated with candidates to be searched.

3. Select the check box for the people in the Search Results list you want to include in the pool and click to place them in the Selection list.

   Selecting Include Direct Reports will automatically add the selected employees' direct reports.

4. Click Select to add those in the Selection list to the pool.

**Result**

The users are added to the Members list.

To search for pool members

**Prerequisite**

[Quick Links] Talent Pools

**Steps**

1. Select a talent pool to display the Members tab.

2. Click and select Open Advanced Search.

   Selecting Add Members, displays the People Selector.

3. Select the criteria you want to use to filter your results and click Search.
4. To add a single person from the Employee column, click \( \text{to display the Go To menu and select Add to current pool.} \)
5. To add people, select the checkboxes for each person you want to add and click Actions \( \text{and select Add to current pool.} \)
   If one of the people selected is already a pool member, the Add to current pool option is not available.

Result
The people are added to the pool. You can return to the pool by clicking \( \text{.} \)

Filtering Your Talent Pool
Talent pools can be filtered to narrow the focus of larger pools on members who meet specific criteria.
The filters available are contextual and dependent on which modules you are using in your system. They can contain set values in drop-down lists, organization values, free text, dates and customized values. In an instance where you are looking for potential successors, you could use these options to filter your talent pool based on employees with high potential and readiness for promotion. Filters can be used before switching to matrix or chart mode, which helps display only the applicable pool members and enables those modes to display quicker.

To filter your talent pool
Prerequisite
[Quick Links] Talent Pools > Members
Steps
1. From the Filters panel select the required values from the available filters.
   For more details on filtering functionality, see Filtering.
2. Click \( \text{to apply the filters to the members list.} \)
Result
The filter results are persistent and the same pool members are displayed whether you select members, matrix or chart mode.

Evaluating Members using a Matrix
Using a matrix enables collaborators to better visualize and analyze the distinction between pool members on a cell matrix using two data points (X and Y axis values), where Performance and Potential dimensions are the default axes values.

When a matrix is configured and subsequently used, the members who have been added to the pool and have data for each of the dimensions will be included in a matrix cell accordingly. Members who do not have a data value for one or more of the dimensions are placed in a list of unrated employees and must be manually added to the matrix.

Moving members between cells is completed by dragging and dropping and enables you to override the default positions, based on the matrix axes. When a member is initially moved, both the original and overridden cell placement are stored in the database. These updated metrics apply solely to the matrix for that specific talent pool, however, member’s who are currently employees can have their overall employee metrics updated directly from the matrix. Once updated the members can no longer be returned to their original cell.
To use a matrix

Prerequisite

[Quick Links] Talent Pools > Members

Steps

1. Click to open the default system matrix and the rated members are displayed in their appropriate cells.

Switching matrices, can change which members are displayed and in which cells they are positioned, based on the X and Y axis values.

2. To move a member, select their name and drag and drop them into a different cell.

3. To include excluded members, select Show Unrated Pool Members from the Action menu and from the window drag and drop them into matrix cells.

The icons of moved members include an arrow.

4. As well as dragging members between cells, you can update their employee metrics or restore them to their original cell

   a) To update a single member, from their shortcut menu select Update Employee Metrics and click OK or to update all moved members select Update Employee Metrics from the main menu and click OK.

   b) To restore a member, from the shortcut menu select Restore to original cell.

5. Click to display the Cell Details page, where members can be dragged and dropped between cells and where from the More Actions menu you can choose to update a pool members metrics based on which cell they are in.

6. Click to display a PDF version which can be printed and reviewed.

Next Step

To help ensure employees with high potential are prepared for new roles, you can assign development activities.

Evaluating Members using Charts

Charts provide a graphical representation of pool member data.

Charts can contain a wide range of business critical data, such a potential, promotability readiness and risk of loss. You can display the details of each chart bar to get a detailed listing of the members in that car and to display their respective employee metrics. If so configured, charts can provide drill-down capability for viewing members and updating their data in relation to the selected chart.

To evaluate members using charts

Prerequisite

Your system administrator must have associated charts with talent pools.

[Quick Links] Talent Pools

Steps

1. Click the name of the pool and then click to display Chart mode.
2. The default chart is displayed, showing pool members that have corresponding data, enabling them to be included in the chart.

Pool members that are missing the required data to be displayed in the chart are included in the unrated population.

3. The following actions can take place:
   a) From the Charts list, select a different chart and the members are redistributed according to the parameters of that chart.
   b) Click Show Details to display the Bar Details view, from where you can select a bar segment to display member details and drag and drop members to different chart segments.
   c) Click Unrated Population/Show Details to display pool members that are not automatically included in the chart and add them to the chart where required.

Assigning Development Activities to Pool Members

All existing development activities in the system are available to be assigned to pool members.

Development activities can be assigned to pool members by owners and collaborators, regardless of their overall user permissions for development plans. This means it is possible to add activities, but not be able to subsequently view that user's development plan.

To assign development activities

Prerequisite

[Quick Links] > Talent Pools > Members

Steps

1. From the Members list view, select checkboxes for the members and click Assign Activities.
2. Use the Development Activity Selector to choose the required development activities and click Select.
3. Click Yes in the confirmation dialog box.

Result

The development activities are added to the user's development plan.
Talent Pool Housekeeping

Once you have configured your talent pool, the subsequent actions and reference information may be required:

- A history of the changes made to a pool is available: Viewing Talent Pool History
- Depending on your overall user permissions, you can view member details: Viewing Pool Member Details
- If you are a pool owner, you can remove pools from the system: Deleting a Talent Pool
- Reference of the user interface: Talent Pool Fields

Viewing Talent Pool History

A history record contains information on a change made to a talent pool, including the date, details and user making the change.

Prerequisite

Quick Links] Talent Pools.

Steps

1. Select a talent pool from the list.
2. Select the History tab.

Result

All of the changes that have been made to the talent pool since it was created are displayed. Select a column header to sort the list based on the values of that column.

Deleting a Talent Pool

Prerequisite

Ensure you want to delete the talent pool, as the action cannot be undone.

Quick Links] Talent Pools.

Steps

1. Select the check box for the item to be deleted.
   Multiple talent pools can be selected for deletion at the same time.
2. Click and click Yes in the confirmation dialog box.

Result

The talent pool is deleted and removed from the list. Deleting a talent pool only removes the talent pool object from the system. It does not affect users or members associated with it.

Viewing Pool Member Details

Prerequisite

Quick Links] Talent Pools

Steps

1. Click the name of the talent pool to display the Members tab.
2. In List mode, click beside the pool member's name and select the required module from the Action shortcut menu.

Depending on your association to the pool member, different options, such as talent profile, goal plan, or succession plan will be available.

Result
The selected module page is displayed.

Next Step
To return to the talent pool select the browser back button.

Talent Pool Fields
Fields and buttons displayed in Talent Pools are presented in the following table. Each entry in the table includes a field or button, a description, possible values (when they are predefined), the part of the application to which the field or button applies, and the header of the field or button.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Applicable to</th>
<th>Header</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Employees</td>
<td>This displays the People Selector and enables members to be added the pool.</td>
<td>Talent Pools</td>
<td>Members</td>
</tr>
<tr>
<td>Assign Activities</td>
<td>This is used to choose from existing development activities and assigns them to the selected pool members.</td>
<td>Talent Pools</td>
<td>Members</td>
</tr>
<tr>
<td>By</td>
<td>Provides the name of the user who did the action.</td>
<td>Talent Pools</td>
<td>History</td>
</tr>
<tr>
<td>Date and Time</td>
<td>Time the action occurred.</td>
<td>Talent Pools</td>
<td>History</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the pool</td>
<td>Talent Pools</td>
<td>Talent Pools, Details</td>
</tr>
<tr>
<td>Details</td>
<td>Indicates what was actioned.</td>
<td>Talent Pools</td>
<td>History</td>
</tr>
<tr>
<td>Display the List Mode</td>
<td>This is the default view for the Members tab and displays pool members in a list.</td>
<td>Talent Pools</td>
<td>Members</td>
</tr>
<tr>
<td>Display the Matrix Mode</td>
<td>This displays the pool members in a matrix, where all the matrices enabled for the system are available.</td>
<td>Talent Pools</td>
<td>Members</td>
</tr>
<tr>
<td>Email</td>
<td>Email address associated with the pool member.</td>
<td>Talent Pools</td>
<td>Members</td>
</tr>
<tr>
<td>Event</td>
<td>The type of action that occurred.</td>
<td>Talent Pools</td>
<td>History</td>
</tr>
<tr>
<td>Job Title</td>
<td>The job title of the pool member. External candidates do not have this value.</td>
<td>Talent Pools</td>
<td>Members</td>
</tr>
<tr>
<td>Name</td>
<td>Full name of the pool member.</td>
<td>Talent Pools</td>
<td>Talent Pools, Members</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the pool.</td>
<td>Talent Pools</td>
<td>Members</td>
</tr>
<tr>
<td>Open Advanced Search</td>
<td>This displays the Talent Pools Advanced Search window, which enables you to search for potential pool members using customizable fields.</td>
<td>Talent Pools</td>
<td>Members</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Applicable to</td>
<td>Header</td>
</tr>
<tr>
<td>---------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>-----------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>Owner</td>
<td>By default, this is also the creator of the talent pool.</td>
<td>Talent Pools</td>
<td>Details</td>
</tr>
<tr>
<td>Pool Context</td>
<td>Indicates the purpose of the pool. Position indicates the pool is for creating a succession plan for a specific position. Job Role is also for succession planning, but includes all positions related to that role. None leaves the pool unassociated.</td>
<td>Talent Pools</td>
<td>Details</td>
</tr>
<tr>
<td>Potential</td>
<td>Indicates the potential of an employee.</td>
<td>Talent Pools</td>
<td>Members</td>
</tr>
<tr>
<td>Review Rating</td>
<td>Indicates how the employee performed according to their last closed focal review.</td>
<td>Talent Pools</td>
<td>Members</td>
</tr>
<tr>
<td>Risk of Loss</td>
<td>Indicates the probable risk level of the employee leaving the organization.</td>
<td>Talent Pools</td>
<td>Members</td>
</tr>
<tr>
<td>Show Process History</td>
<td>Each time development activities are added to a pool member, an entry is added here indicating the process of the activity.</td>
<td>Talent Pools</td>
<td>Talent Pools</td>
</tr>
<tr>
<td>Type</td>
<td>A blue icon indicates an internal employee and a green icon indicates an external candidate. Only employees can have activities assigned to them and have review rating, risk of loss, and potential values.</td>
<td>Talent Pools</td>
<td>Members</td>
</tr>
<tr>
<td>Users</td>
<td>Users collaborate and work on the pool, such as adding pool members and working with matrices.</td>
<td>Talent Pools</td>
<td>Talent Pools, Details</td>
</tr>
</tbody>
</table>