



# **Siebel Performance Management Guide**

Version 7.8, Rev. A  
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# 1

## What's New in This Release

### What's New in Siebel Performance Management Guide, Version 7.8, Rev. A

Table 1 lists the changes in this revised version of the documentation to support release 7.8 of the software. Some chapters of the Siebel Performance Management Guide were derived from the Siebel Employee Relationship Management Administration Guide, which is no longer published.

Table 1. Revised content in Siebel Performance Management Guide, Version 7.8, Rev. A

Topic	Description
Creating a review component See <a href="#">Defining Review Components on page 24</a> .	Revised navigation path in Step 1 of procedure <i>To create a review component</i> .
Login to approve or decline a performance review. Navigation to My Direct Reports See <a href="#">Approving and Declining Submitted Performance Reviews on page 39</a> .	Added manager login to Step 1 of procedure <i>To approve or decline a submitted review</i> . Changed navigation information to My Direct Reports in Step 2.
Competency and Assignment Manager See <a href="#">Integrating the Competency Management System with Assignment Manager on page 64</a> .	This new topic describes the steps required to integrate a Competency Management System with Assignment Manager.
File System Parameter setup and instanceconfig.xml file See <a href="#">Setting the File System Parameter During Analytics Server Setup on page 97</a> .	Revised reference to instanceconfig.xml file in Step 2 of procedure <i>To set the file system parameter</i> . Added information describing where the instanceconfig.xml file is located.
Server path and location of SiebelAnalytics.webcat.16.autosave file Variable for Analytics Web Server in path See <a href="#">Preserving Analytics Web Catalogs on page 98</a> .	Added example server to path statement for location of Analytics catalogs in Step 1 of procedure <i>To preserve a Web catalogs for use with other Analytics servers</i> . Added variable for server path in Step 2 of procedure <i>To preserve a Web catalogs for use with other Analytics servers</i> .

Table 1. Revised content in Siebel Performance Management Guide, Version 7.8, Rev. A

Topic	Description
Performance Scorecard integration and WI Symbolic URL List view See <a href="#">Verifying Performance Scorecard Integration on page 103</a> .	Corrected navigation path to WI Symbolic URL List view in Step 1 of procedure <i>To verify Performance Scorecard integration</i> .
Global field value and Synchronization See <a href="#">Synchronize and Synchronize All Buttons on page 112</a> .	Added information in topic describing Global value field changes and synchronization.
Employee Objectives KPI view See <a href="#">Employee Objective KPIs View on page 113</a> .	Amplified information about how synchronization occurs.
Global KPI Request See <a href="#">Defining a Global KPI Request on page 117</a> .	Corrected path of Destination Folder in Step 11a of procedure <i>To define a Global KPI Request</i> .
Employee-Specific KPI Request See <a href="#">Creating an Employee-Specific KPI Request on page 119</a> .	Added note specifying the end-of-file location in Step 12 of procedure <i>To create an employee-specific KPI request</i> .  Corrected path of Destination Folder in Step 13a of procedure <i>To create an employee-specific KPI request</i> .
KPI Access Groups See <a href="#">Selecting KPI Access Groups on page 124</a> .	Revised Step 2 in procedure <i>To select KPI Access Groups</i> specifying that the Private check box must be selected.
Objective Scorecard See <a href="#">Reviewing the Objectives Scorecard on page 127</a> .	Added information as Steps 3 and 4 in procedure <i>To review the Objectives Scorecard</i> .

Table 2. New Product Features in Siebel Performance Management Guide, Version 7.8

Topic	Description
Competency Management and Assignment Manager See <a href="#">Chapter 5, "Setting Up Competency Management."</a>	This new feature allows users to synchronize Competency skills with Assignment Manager skills. This synchronization process allows organizations to use competency management skills as assignment criteria in Assignment Manager.
Performance Scorecard and Performance KPIs See <a href="#">Chapter 7, "Setting Up and Administering Performance Scorecard."</a>	This new feature allows an organization to track the metrics for Key Performance Indicators (KPIs) and objectives to assess how well performance goals are being met.
Performance Scorecard See <a href="#">Appendix A, "Performance Scorecard Reference."</a>	This new appendix provides information on Performance Scorecard background processes.



# 2

## Getting Started

This chapter describes the applications administration procedures that are relevant to Siebel Performance Management and also provides information on installation tasks specifically for the Performance Scorecard. Use this chapter in combination with *Applications Administration Guide* and *Siebel Installation Guide* for the operating system you are using.

The *Applications Administration Guide* covers the setup tasks that are common to all Siebel Business Applications, such as using license keys, defining employees, and defining your company's structure. It also provides the information that you need to perform data administration and document administration tasks.

This guide assumes that you have already installed your Siebel application. If you have not, go to the Server Installation and Upgrade section of the Siebel Bookshelf, and click the links to the guides that are relevant to your company's implementation.

To create the Siebel Administrator account that is used to perform the tasks described in this guide, see the *Siebel Installation Guide* for the operating system you are using. For example, see *Siebel Installation Guide for Microsoft Windows: Servers, Mobile Web Clients, Tools*.

This chapter includes the following topics:

- [Administrator Setup Tasks on page 14](#)
- [Configuring Performance Management for a GUESTERM User on page 15](#)

## Administrator Setup Tasks

Table 3 lists and describes the administrative setup tasks that are specific to Siebel Performance Management. The table also directs you to documentation that provides information about each task. When setting up your application, use Table 3 in combination with *Applications Administration Guide*.

Table 3. Administrative Setup Tasks

Administrative Task	Description	For More Information
Install servers and applications, and then enter license keys for specific Siebel applications.	Install Siebel Gateway Name Server, Siebel Server, Siebel Database Server, Analytics Servers and Siebel Web Servers.	Refer to the <i>Siebel Installation Guide</i> for the operating system you are using. For example, <i>Siebel Installation Guide for Microsoft Windows: Servers, Mobile Web Clients, Tools</i> .
Install and configure for Performance Scorecard.	<p>Enable the Workflow Manager and EAI component groups for Performance Scorecard.</p> <p>Set up the MarketingFileSystem parameter allows the Siebel Analytics Server to communicate with the Siebel Server for an exchange of data on Key Performance Indicators.</p> <p>Activate the workflows that allow Siebel Object Manager and Siebel Analytics to communicate.</p> <p>Configure Web Services to enable Siebel Server communication with the correct Siebel Analytics Server for KPI Analytics load.</p> <p>Set up Symbolic URL to display KPI views.</p> <p>Configure Analytics server parameters so that the Object Manager references the correct Analytics Web Server parameters.</p> <p>Schedule server repeating jobs to retrieve KPI values.</p> <p>(Optional) Preserve an existing Web catalog for use with other Analytics servers.</p>	<p>See <a href="#">“Enabling Component Groups for Performance Scorecard”</a> on page 96.</p> <p>See <a href="#">“Setting the File System Parameter During Analytics Server Setup”</a> on page 97.</p> <p>See <a href="#">“Activating Workflows to Request Scorecard KPI Values”</a> on page 98.</p> <p>See <a href="#">“Preserving Analytics Web Catalogs”</a> on page 98 and <i>Siebel Analytics Web Administration Guide</i>.</p> <p>See <a href="#">“Configuring Web Services for KPI Analytics Load”</a> on page 99.</p> <p>See <a href="#">“Setting Up Symbolic URL for KPI Views”</a> on page 100 and <i>Applications Administration Guide</i>.</p> <p>See <a href="#">“Configuring Server Parameters for ERAdmin Object Manager”</a> on page 100.</p> <p>See <a href="#">“Scheduling a Repeating Server Job for KPIs”</a> on page 101.</p> <p>See also <i>Siebel Analytics Installation and Configuration Guide</i>, <i>Siebel Analytics Server Administration Guide</i>, and <i>Siebel Analytics User Guide</i>.</p>

Table 3. Administrative Setup Tasks

Administrative Task	Description	For More Information
(Optional) Set up the Application Services Interface (ASI) to synchronize data between Performance Management and a third-party system.	Configure Web Services, activate the Employee ASI Workflow, and set up synchronization between Performance Management and the third-party system.	See <i>Application Services Interface Reference</i> .
Activate Business Processes	Verify that Performance Management-specific workflow processes are active, and create new processes if desired.	See <i>“Activating Workflows to Request Scorecard KPI Values” on page 98</i> .  See also <i>Siebel Business Process Designer Administration Guide</i> .
Set up Responsibilities for delegated administrators and users.	Assign users and views to preconfigured responsibilities; create new responsibilities.	See <i>Applications Administration Guide</i> .
Configure Performance Management for the GUESTERM user.	This user ID verifies that each user logging in to Siebel Performance Management sees the proper Home Page with the correct page tab.	See <i>“Configuring Performance Management for a GUESTERM User” on page 15</i> .

## Configuring Performance Management for a GUESTERM User

After installing the server and application, you must configure the application for the GUESTERM (guest ERM) user. This user ID verifies that each user logging in to Performance Management sees the proper Home Page with the correct page tab.

### To set up the GUESTERM user

- 1 Using the appropriate database software for your database, create a database login with the following parameters:

Login = GUESTERM

Password = DBPASSWORD

(DBPASSWORD represents a password that you provide.)

This step creates the GUESTERM user database account, as required for your RDBMS system.

**NOTE:** The password is only required for db2 and non OCI MSSQL databases.

- 2 Stop the Web server.

- 3 Open the eapps.cfg file from SWEApp\BIN directory.

**NOTE:** The eapps.cfg file is installed on the Web server, within the Siebel directory.

The SWEApp\bin\eapps.cfg file includes definitions that allow unregistered user access.

- 4 Locate the following section of the eapps.cfg file.

```
[/ERM]
```

```
AnonUserName = guesterm
```

```
AnonPassword = password
```

```
ConnectionString = ...
```

```
StartCommand = SWECmd=GotoView&SWEView=Portal+Page+Home+View
```

- 5 Enter the following values.

```
AnonUserName = GUESTERM
```

```
AnonPassword = DBPASSWORD
```

- 6 Save the eapps.cfg file.

- 7 Restart the Web server.

# 3

## Setting Up Objectives and Reviews

When you use Siebel Objectives and Reviews, completion of performance objectives and reviews becomes a collaborative process between management and employees. The organization provides feedback on employees' goals and objectives using periodic and annual reviews, 360-degree evaluations, and skills assessments.

This chapter covers administrator setup and end-user procedures for Objectives and Reviews. It includes the following topics:

- [Scenario for Objectives and Reviews on page 18](#)
- [Process of Setting Up Objectives and Reviews on page 20](#)
- [Employee Objective Hierarchy on page 21](#)
- [Publication of Objectives on Microsites on page 22](#)
- [Defining a Rating Scale with Rating Values on page 22](#)
- [Defining Review Periods and Rollups on page 23](#)
- [Defining Review Components on page 24](#)
- [Creating Objectives Templates on page 26](#)
- [Defining 360-Degree Evaluation Forms on page 27](#)
- [Creating Review Definitions on page 28](#)
- [Managing Objectives and Reviews by Organization on page 30](#)
- [Defining Objectives Before the Next Period Begins on page 31](#)
- [Managing and Updating Objectives and Reviews on page 32](#)
- [Unlocking Approved Objectives for Midperiod Updates on page 34](#)
- [Performance Management for Direct Reports on page 35](#)
- [Delegating a Performance Review on page 38](#)
- [Approving and Declining Submitted Performance Reviews on page 39](#)
- [Copying Previous Objectives \(End User\) on page 40](#)
- [Adding Performance Assessments During the Cycle \(End User\) on page 40](#)
- [Tracking Progress on Objectives \(End User\) on page 41](#)

## Scenario for Objectives and Reviews

This scenario provides an example of a process performed by an administrator, a manager, and an employee using Objectives and Reviews. Your company may follow a different process flow according to its business requirements.

### Administrator Sets Up Objectives and Reviews

Before an employee or manager can use the Objectives and Reviews system, the administrator sets up the system accordingly to the organization's performance management policies and procedures. For example, an organization may choose different components to make up a review. The administrator defines those components to match the organization's performance management goals.

The administrator defines review periods, review components, organizational hierarchy, rating scales, and so on.

### End Users Develop Objectives and Submit for Approval

At the beginning of each review period, an organization's employees use Siebel Objectives and Reviews to view corporate objectives and the objectives of their managers.

Using these cascading objectives as a guide, the employee develops individual objectives and assigns each objective a weighting that is used to calculate the employee's overall performance rating at the end of the period. The employee may copy continuing objectives from the previous review periods forward into the new period.

After defining the objectives, the employee submits the objectives to the employee's manager for approval. The manager approves the objectives, and the objectives are posted in a reporting-structure hierarchy, accessible for review by each employee in the organization.

During the performance period, the employee notes progress toward an objective and adds comments. As an objective is achieved, the employee sets the status indicator to reflect progress.

At the end of each period, the employee begins the review process by completing a self-assessment that details achievement on each objective as well as documenting additional skills that have been acquired.

The employee submits the periodic assessment to a manager, who then rates and comments on the achievement of objectives and skills. Siebel Objectives and Reviews calculates an overall rating from individual numerical ratings and weightings assigned to each objective.

The employee's manager submits the review for approval by the next-level manager, and when the final approval is achieved, the review is returned to the employee for acknowledgement.

Figure 1 illustrates the process of setting and submitting objectives.

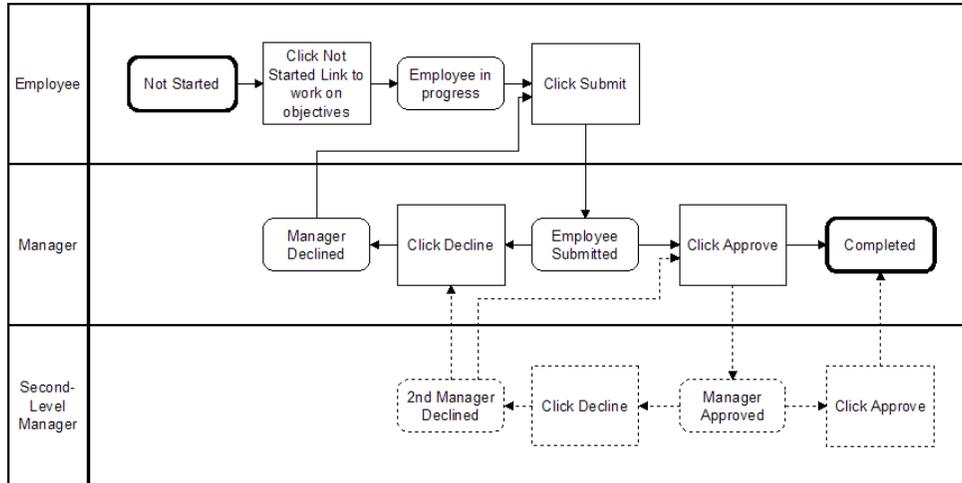


Figure 1. Objectives Cycle Process Flow

### Managers Assess Progress and Conduct Reviews

After objectives are approved, the manager periodically comments on her direct reports' objectives and sets progress status.

During the review cycle, the manager approves and declines some of the reviews and delegates other reviews of direct reports to another manager. The other manager then reviews the periodic assessment comments in the employee's objectives and conducts the review.



## Administrator Procedures

Perform the procedures in the following list to administer Objectives and Reviews:

- [Defining a Rating Scale with Rating Values on page 22](#)
- [Defining Review Periods and Rollups on page 23](#)
- [Defining Review Components on page 24](#)
- [Creating Objectives Templates on page 26](#)
- [Defining 360-Degree Evaluation Forms on page 27](#)
- [Creating Review Definitions on page 28](#)
- [Managing Objectives and Reviews by Organization on page 30](#)
- [Defining Objectives Before the Next Period Begins on page 31](#)
- [Managing and Updating Objectives and Reviews on page 32](#)
- [Unlocking Approved Objectives for Midperiod Updates on page 34](#)

## Manager Procedures

Perform the procedures in the following list to manage objectives and reviews:

- [Delegating a Performance Review on page 38](#)
- [Approving and Declining Submitted Performance Reviews on page 39](#)

## End-User Procedures

To use objectives and reviews, perform the following procedures:

- 1 [Copying Previous Objectives \(End User\) on page 40](#)
- 2 [Adding Performance Assessments During the Cycle \(End User\) on page 40](#)
- 3 [Tracking Progress on Objectives \(End User\) on page 41](#)

# Employee Objective Hierarchy

The employee hierarchy is defined using Siebel Position Administration. The relationship between an employee's position and the corresponding parent position controls both the approval routing for objectives and reviews and the hierarchy within the All Employees Objectives and My Team's Objectives views. Employees whose positions do not have parent positions appear at the top level of the All Employees Objectives view and automatically bypass the manager approval process for both objectives and reviews.

To use Siebel Performance Management, users must have an active employee record and an active position. When an employee holds multiple positions, only the employee's primary position is used in the All Employees Objectives and My Team's Objectives views and when routing approvals.

**NOTE:** No two employees can have the same primary position. When more than one employee occupies the same position, the employee whose name comes first alphabetically appears in the All Employee Objectives and My Team's Objectives views. For more information on position administration, see *Applications Administration Guide*.

#### Related Topic

[Process of Setting Up Objectives and Reviews on page 20](#)

## Publication of Objectives on Microsites

Publishing corporate objectives to the Corporate Objectives view is administered using Siebel Microsite pages. For more information, see *Applications Administration Guide*.

#### Related Topic

[Process of Setting Up Objectives and Reviews on page 20](#)

## Defining a Rating Scale with Rating Values

When completing periodic and annual reviews, managers rate employees on individual objectives, shared objectives, and skills. To support this process, one or more rating scales are designed and administered within the application.

You can create multiple rating scales for use with different review definitions, and you can define different review components within a review definition. During a performance review, Siebel Objectives and Reviews takes the ratings for each objective multiplies them by the objectives' weightings, and then sums these to give the overall calculated rating for the review.

This task is a step in "[Process of Setting Up Objectives and Reviews](#)" on page 20.

#### *To define a rating scale*

- 1 Navigate to the > Administration - Performance Management screen > Review Configuration view.
- 2 From the visibility filters, choose Rating Scales.

- 3 In the Rating Scales list, add a rating scale record, provide a name, and then complete the remaining fields.

The following table describes some of the fields.

Field	Comments
Type	The type of rating scale. Options are Performance Management, which is used for rating performance on objectives, and Competency Management, which is used for competencies and skills levels.
Active	Automatically populated with a check mark that indicates the rating scale is active or inactive.

**To create rating values for the rating scale**

- 1 In the Rating Scales list, select the rating scale.
- 2 In the Ratings list, add a rating, and provide a name and description.

**NOTE:** Query to search for an existing rating record.

The following table describes the fields in the rating record.

- 3 In the Rating field, enter a whole number value for the rating.

For example, the rating Did Not Meet Objective (0%) might have a rating of 1, and the rating Substantially Exceeded Objective (110%+) might have a value of 5.

Repeat this procedure to add ratings and values to create a range for the rating scale.

**CAUTION:** Do not delete a rating scale. If you no longer need the rating scale, make it inactive by changing the active flag for that rating scale. This precaution retains the consistency of past reviews on the system that are using that rating scale.

## Defining Review Periods and Rollups

Siebel Objectives and Reviews allows organizations to conduct annual reviews that include components such as shared objectives (for example, the organization’s core values), skills assessments, 360-degree evaluations, and rollups of periodic reviews.

Periodic reviews are used to evaluate the performance of each employee multiple times during the year. A typical periodic review cycle is assessment conducted on a quarterly basis.

If a review period definition includes a rollup of periodic reviews, the rollup period type for the review period record must be defined.

For example, if your company’s previous quarterly reviews are rolled up into an annual review, then define the Rollup Period Type for the Year period record as Quarter. Then, the annual review ratings for the defined period include a rollup (the average) of the overall ratings from any completed quarterly reviews falling within the annual period.

**NOTE:** Review Periods and period units are defined using the Applications Administration screen. For more information on defining periods, see *Applications Administration Guide*.

This task is a step in [“Process of Setting Up Objectives and Reviews” on page 20.](#)

**To change the rollup period type of a review period**

- 1 Navigate to the > Administration - Performance Management screen > Review Configuration view.
- 2 From the visibility filters, choose Review Periods.
- 3 In the Review Periods list, select the record you want to edit, and then choose a value in the Rollup Period Type field.

The following table describes some of the fields in the review period record.

Field	Comments
Period Type	The type of review period. The options are Day, Week, Bi-weekly, Month, Quarter, Half-Year, and Year.
Rollup Period Type	This field is optional. Leave this field blank unless you intend to use the review period to roll up other reviews. If you want to roll up reviews, specify the type of period to roll up for this period type.  A Period Type and Rollup Period Type combination of Year and Quarter specifies that the annual review overall rating can include a rollup (average) of the overall ratings from quarterly reviews completed during the year.
Start Date	The start date for the period.
End Date	The end date for the period.

## Defining Review Components

Periodic and annual reviews include one or more review components. Examples of review components include employee objectives, shared objectives (such as company-wide core values), and skills assessments.

You can define review components using the Review Components view. After review components are defined, the components are associated with review definitions and are accessible to users during the objectives and review processes. You can also translate review component display names, such as tabs, into other languages.

This task is a step in [“Process of Setting Up Objectives and Reviews” on page 20.](#)

**Related Topics**

- [Translating Review Component Display Names on page 26](#)
- [Creating Review Definitions on page 28](#)

**To create a review component**

- 1 Navigate to the Administration - Performance Management screen > Review Configuration view.
- 2 From the visibility filters, select Review Components.
- 3 In the Review Components list, add a record and complete the fields.

The following table describes some of the fields.

Field	Comments
Type	<p>The type of review component, choosing from the following options. Types include:</p> <ul style="list-style-type: none"> <li>■ Rollup. Includes the average of previous periodic review ratings in the overall review rating.</li> <li>■ Shared Objective 1-5. Objectives that are predefined by the organization. These objectives not editable by the employee. The review component can be used within a periodic or annual review definition.</li> <li>■ 360 Degree Evaluation. 360 degree evaluations can be used within a periodic or annual review definition.</li> <li>■ Individual Objective 1-5. Objectives that are defined by individual employees. These objectives should only be used within a periodic review definition.</li> <li>■ Skills. Assessment of employee skills that automatically updates the employee competencies within Competency Management when the review is approved. Skills assessment can be used within a periodic or annual review definition. Employees can propose new competency levels as part of a review, and managers should change the values if they believe the employee performs at a different competency level. Any levels that are changed during this process are reflected in the skill profile of the employee after the review is approved.</li> <li>■ Training Plan. Displays training course enrollments from the Training module. This review component can be used within a periodic or annual review definition.</li> </ul>
Name	Name of the review component. For example, Quarterly Review Rollup.
Default Display	The display name of the component tab as it appears to the user.
Effective Date	The start date for the review component. This is the date on which the review component becomes active.
Active	A check mark indicates the review component is active.

## Translating Review Component Display Names

You can use the Display Translation view to translate review component display names, such as tabs, into other languages. This feature is useful when Siebel Objectives and Reviews is deployed within a multilingual environment. If the display translation is defined, end users who access the application with a foreign language pack see a translated display name for the tab. If the display translation is not defined for a user's language pack, the Default Display from the review component definition appears.

### *To define display translations*

- 1 Navigate to the Administration - Performance Management screen > Review Configuration view.
- 2 From the visibility filters, select Review Components.
- 3 In the Review Components list select the review component, and then click the Display Translation view tab.
- 4 In the Display Translation list, add a record.
- 5 Select the language, and enter the translated text for the review component display name in the Display field.

## Creating Objectives Templates

Objectives Templates allow organizations to create and distribute predefined objectives. Employees whose review definitions include a review component with an objectives template automatically inherit the predefined objectives.

Objectives templates should only be used for Individual Objectives and Shared Objectives review component types.

This task is a step in ["Process of Setting Up Objectives and Reviews"](#) on page 20.

### *To create an objectives template*

- 1 Navigate to the Administration - Performance Management screen > Review Configuration view.
- 2 From the visibility filters, select Review Components.
- 3 In the Review Components list select the review component, and then click the Objectives Templates view tab.  
**NOTE:** You should create Objectives templates only for Individual Objectives 1-5 or Shared Objectives 1-5 type review components. Employees can edit Individual Objectives, but they cannot edit Shared Objectives.
- 4 In the Objectives Templates list, add a record, and provide a name, description and sequence for the objective.
- 5 In the Weight field, enter a value for the objective weight.

Weights for an objective template with a review component type Shared Objective should always add up to 100 percent.

- 6 Repeat [Step 4](#) and [Step 5](#) to add additional objectives to the template.  
The total weight for all objectives must equal 100 percent.
- 7 When you have finished defining the objectives template, save the template.

## Defining 360-Degree Evaluation Forms

You use the Evaluation Forms view to associate 360-degree evaluation-type review components with specific evaluation forms. You can define a different 360-degree evaluation form for each type of work relationship that exists between evaluators and individuals who are evaluated.

For example, the form used for a peer evaluation can differ significantly from the form used for an upward evaluation. The definition of the 360-degree evaluation forms is administered using Siebel SmartScript.

This task is a step in [“Process of Setting Up Objectives and Reviews”](#) on page 20.

### Related Topics

See *Siebel SmartScript Administration Guide*.

### To define evaluation forms

- 1 Navigate to the Administration - Performance Management screen > Review Configuration view.
- 2 From the visibility filters, select Review Components.
- 3 In the Review Components list, select the review component, and then click the Evaluation Forms view tab.
- 4 In the Evaluation Forms list, add a record, complete the fields, and then save the record.

The following table describes the fields in the evaluation form record.

Field	Comments
Name	The name of the 360-degree evaluation type.
Sequence	The sequence number of the evaluation type.

Field	Comments
Type	<p>The type of the 360-degree evaluation. Types include:</p> <p><b>Manager.</b> The evaluator is the superior to the employee that is being evaluated (downward evaluation).</p> <p><b>Subordinate.</b> The evaluator is the subordinate of the employee that is being evaluated (upward evaluation).</p> <p><b>Peer.</b> The evaluator is a peer of the employee that is being evaluated (peer evaluations).</p> <p><b>Colleague.</b> The employee that is being evaluated is a colleague of the evaluator.</p>
Form	The SmartScript that is used as the 360-degree evaluation form for the 360 degree evaluation type. The Pick SmartScript dialog box only lists SmartScripts with a 360-degree evaluation type of SmartScripts.

Repeat this procedure to create as many evaluation forms as necessary.

Figure 3 shows the Evaluation Forms list including peer, colleague, subordinate, and manager evaluation types.

Name	Sequence	Type	Form
Colleague Evaluation	2	Colleague	Colleague Evaluation
Manager Evaluation	3	Manager	Manager Evaluation
Peer Evaluation	1	Peer	Peer Evaluation
Subordinate Evaluation	4	Subordinate	Subordinate Evaluation

Figure 3. Evaluation Forms List

## Creating Review Definitions

Review Definitions control the format and underlying processes used within objectives and reviews. These processes include the review type, required approval levels, and review components. Review definitions can also be created for specific organizations, divisions, and job families.

**CAUTION:** Do not modify or delete a review definition that has been used previously during an objectives and review cycle. Instead, create a new review definition with the desired effective date and inactivate the previous review definition. A review definition should not have more than one component of the same Objective Type.

The selection of review components within a review definition determines the format of the objectives and reviews process. For example, if Individual Objectives, Shared Objectives, and the Training Plan review components are added to a review definition, these components are accessible to employees during the objectives and review process.

The rating scale assigned to an Individual Objectives or Shared Objectives review component determines which rating scale the manager uses when rating the employee's performance in meeting those objectives. By defining the weights of the Individual Objectives and Shared Objectives review components as 75 percent and 25 percent, respectively, the resulting aggregate scores of each component are weighted accordingly when determining the calculated overall rating.

Organizations can control which review definitions are used by different employee subgroups by associating Divisions and Job Families with a review definition. The employee attributes are matched with review definition attributes, as indicated in the following list, to make sure the appropriate review definition is selected for each employee:

- The review definition is matched with the Organization, Division, and Job Family.
- The review definition is matched with the Organization and Division.
- The review definition is matched with the Organization Job Family.
- The review definition is matched with the Organization.

**NOTE:** Only the objectives from the review component type Individual Objectives 1 appear within the All Employee Objectives and My Team's Objectives tree views. For employee objectives to appear in these views, you must create an Individual Objectives 1 review component and associate it with the desired review definition.

This task is a step in ["Process of Setting Up Objectives and Reviews"](#) on page 20.

**To create a review definition**

- 1 Navigate to the Administration - Performance Management screen > Review Configuration view.
- 2 From the visibility filters, select Review Definitions.
- 3 In the Review Definitions list, add a review definition, provide a name and a description, and then complete the remaining fields.

The following table describes some of the fields.

Field	Comments
Active	A check mark indicates the review definition is active.
Effective Date	The start date for the review definition. This is the date on which the review definition becomes active.
Maximum 360 Evaluators	The maximum number of 360-degree evaluators that can be selected by an employee. If an employee submits a list of 360-degree evaluators exceeding the maximum number, an error message appears.
Minimum 360 Evaluators	The minimum number of 360-degree evaluators that can be selected by an employee. If an employee submits a list of 360-degree evaluators with fewer than the minimum number, an error message appears.

Field	Comments
Objectives Approval Levels	The level of management approval required for periodic reviews. Options are 0, 1, and 2. These values correspond to the number of managers who must review and approve an employee's periodic review.
Organization	The organization for which the review definition is defined.
Period Type	The period type for the review. For example, to create an annual review, set the period type to Year. To create a quarterly review, set the period type to Quarter.
Review Approval Levels	The level of management approval required for annual reviews. Options are 0, 1, and 2. These values correspond to the number of managers who must review and approve an employee's annual review.
Review Type	The type of review. For a periodic review, the type must be Periodic Review. For an annual review, the review type must be annual review.
Sequence	The sequence of the review definition. If more than one review definition with the same Period Type exists for an organization, the review definition with the highest sequence number applies.

## Managing Objectives and Reviews by Organization

Siebel Objectives and Reviews module defines the objectives and reviews period at the organization level. Each organization can have different review definitions assigned to it, but the organization must use the same period type.

By managing attributes at the organization level, you can control which objectives and reviews appear on the Performance Management Dashboard, All Employee Objectives, and My Team's Objectives views. In addition, you can also control the availability of the annual review by organization from the Performance Management Dashboard.

This task is a step in ["Process of Setting Up Objectives and Reviews"](#) on page 20.

### *To manage organizations for Objectives and Reviews*

- 1 Navigate to the Administration - Group screen > Organizations view.
- 2 Click on the parent object in the Explorer to show suborganizations and then, in the Organizations list, select the organization.

- 3 In the Organization form, complete the fields to configure the organization settings.

The following table describes some of the fields.

Field	Comments
Current Objectives Period	The name of the current objectives period. This name identifies which objectives period appears in the Performance Management Dashboard, All Employees Objectives and My Team's Objectives views. This value should match a value in the Name field in the Review Period Administration view.
Current Review Period	The name of the review period. This name identifies which review period appears in the Performance Management Dashboard. This value should match the Name field value in the Review Period Administration view.
Annual Review Start Offset	The number of days before an employee's Next Annual Review that the annual review link is active in the Performance Management Dashboard. A value of -N specifies that the annual review link is active N days before the employee's next annual review date.
Annual Review End Offset	The number of days before an employee's Next Annual Review that the annual review link on the Performance Management Dashboard remains active. A value of +N specifies that the annual review link remains active N days after the employee's next annual review date. The annual review offset allows organizations to perform annual reviews on the anniversary date of the employee's last annual review date.  Some organizations may choose to perform the annual review on the same date for all employees. In this case, the value in the Next Annual Review date field must be the same for each employee in the organization.

## Defining Objectives Before the Next Period Begins

Before you can change the performance period, you must create objective records in the database for the next performance cycle. This task is typically performed as your organization begins reviews of current performance and before employees define new objectives.

This task is a step in ["Process of Setting Up Objectives and Reviews" on page 20](#).

### Related Topic

[Managing Objectives and Reviews by Organization on page 30](#)

### *To create records for the new objective period*

- 1 Navigate to the Administration - Performance Management screen > Performance Records Administration view.
- 2 From the visibility filters, select Performance by Period and query for the objectives period.
- 3 Click Create Records.
- 4 Select the employees for whom you want to create records, and then click Create Selected Employee Records.

You can click Create All Employee Records to create records for all employees in the system. Applicable employee records for the period appear in the Employee list.

**NOTE:** A review definition must exist that matches the employee for which you are creating records. If there is no review definition that applies to an employee, the system returns an error, canceling the Create Records process.

## Managing and Updating Objectives and Reviews

When necessary, you can update the status and details (including ratings and comments) for an employee's objectives and reviews, and view the employee's previous reviews. For example, you can override the status of an employee's review if it was mistakenly submitted.

Because of the sensitivity of employee review data, it is recommended that you only grant access to the All Employees Performance view to authorized personnel.

**NOTE:** As a best practice, a review that has already been approved and acknowledged by an employee should not be modified. If a decision is made to remove an employee objective, the administrator can access a specific review record for an employee and delete the period containing the objective from the list. The objectives reappear in the employee record if the employee restarts the review for the period. To make sure the review record does not reappear, the administrator must access the employee record, delete each individual objective, and then delete the review record for that period.

This task is a step in ["Process of Setting Up Objectives and Reviews"](#) on page 20.

### *To override the review status*

- 1 Navigate to the Administration - Performance Management screen > Performance Records Administration view.
- 2 From the visibility filters, select Performance by Period.
- 3 In the Period list, select the period, and then in the Employee list, query to locate the employee record.

- 4 In the employee record, change the value for Objective Status or Review Status as desired, and then save the changes.

The following table describes objective status values.

Objectives Status	Comments
Not Started	Objectives have not been started by the employee.
Employee in Progress	Objectives are being defined by the employee.
Employee Submitted	Objectives have been submitted by the employee and are waiting for approval.
Manager Declined	Objectives have been declined by the manager and are accessible to the employee.
Manager Approved	Objectives have been approved by the manager and are awaiting approval by the next level manager. This status is only valid when the objectives require two levels of manager approval.
2nd Manager Declined	Objectives have been declined by the next level manager, and are accessible by the manager.
Completed	Objectives have received the required approvals and are posted to the All Employees Objectives and My Team's Objectives views.
Not Required	Objectives are not required. Objectives that are not required are counted in the Department Status Report.

The following table describes status values associated with reviews.

Review Status	Comments
Not Started	The employee has not started the self-review.
Employee in Progress	The employee has begun the self-review.
Employee Submitted	The employee has submitted the self-review to the manager. The manager is responsible for completing the review.
Manager in Progress	The manager is in the process of completing the review.
Manager Declined	The manager has declined the employee's self-review. The self-review is accessible to the employee.
Manager Approved	The review has been approved the manager and is awaiting approval by the next-level manager. This status is only valid when reviews require two levels of manager approval.
2nd Manager in Progress	The next-level manager is in the process of completing the review.
2nd Manager Declined	The next-level manager has declined the review. The review is accessible by the manager.

Review Status	Comments
2nd Manager Approved	The next level manager has approved the review. The review is ready for release to the employee by the manager.
Completed	The review has received all necessary approvals and is released to the employee for acknowledgement.
Acknowledged	The completed review has been acknowledged by the employee.
Not Required	The review is not required. Reviews that are not required are counted in the Department Status Report.
Evaluator List in Progress	The employee is in the process of completing the list of 360-degree evaluators.
Evaluator List Submitted	The list of 360-degree evaluators has been submitted for approval by the employee.
Evaluator List Approved	The list of 360 degree evaluators has been approved by the manager. Links to the 360-degree evaluation appear on the evaluator's Performance Management Dashboard, and the employee can begin the self-review.
Evaluator List Declined	The list of 360-degree evaluators has been declined by the manager and is accessible to the employee.
Pending Distribution Rating	The review is pending distribution approval from management. This status is only available when the administrator defines a rating distribution cycle using the compensation planning tool. For more information, see <a href="#">Chapter 4, "Working with Ratings Distributions."</a>

## Unlocking Approved Objectives for Midperiod Updates

Companies that want to allow employees to update their objectives in the middle of a period can unlock them for editing. This capability is useful when a new hire needs to begin the objectives process mid-period. When the administrator unlocks objectives, the objectives status is set to Not Started, and the approval process is repeated.

Objectives are unlocked at the organization level. A company may unlock objectives for organization A, but not for Organization B. The administrator can select all or some organizations when unlocking objectives.

This task is a step in ["Process of Setting Up Objectives and Reviews"](#) on page 20.

### *To unlock objectives*

- 1 Navigate to the Administration - Performance Management screen > Performance Records Administration view.
- 2 From the visibility filters, select Performance by Period.

- 3 In the Performance by Period list, select the period, and then click Unlock Objectives.
- 4 From the Pick Divisions dialog box, perform one of the following tasks:
  - Click Unlock All Divisions, and confirm the choice.
  - In the list, select the divisions for the objectives you want to unlock, and click Unlock Selected Divisions.

## Performance Management for Direct Reports

In addition to managing their own performance objectives, managers can use the Performance Management Dashboard to manage performance-related tasks, such as evaluations and reviews, for their direct reports.

Figure 4 shows the Performance Management Dashboard with the following elements:

- My Performance
- MyDirect Reports
- My Next-Level Reports
- Delegated Approvals
- 360-Degree Approvals lists

The left Navigation bar provides links to Team Objectives, All Employee Objectives, Corporate Objectives, the manager’s performance (My Performance), My Team’s Performance, the Department Status Report, and Ratings Distribution Report, an Employee by Rating Report, and a 360-degree Evaluations History.

The screenshot shows the Performance Management Dashboard with a navigation bar at the top and a left sidebar. The main content area is titled "Performance Management Dashboard: My Performance" and contains several sections:

- My Performance:** A table with columns: Name, Quarterly Objectives Q4 2002, Quarterly Review Q3 2002, and Annual Review. Data row: Jason Rubin, Completed, ! Employee In Progress, 9/15/2002.
- My Direct Reports:** A table with columns: Name, Quarterly Objectives Q4 2002, Quarterly Review Q3 2002, and Annual Review. Data rows: Howard Hunt (Completed, 7/15/2003), Melissa Marks (Completed, 10/15/2002), Pat Moore (Completed, 10/15/2002), Ashley Parker (! Employee Submitted, ! Manager In Progress, 10/15/2002).
- My Next Level Reports:** A table with columns: Name, Quarterly Objectives Q4 2002, Quarterly Review Q3 2002, and Annual Review. Data rows: Martin Booth (Completed, 9/15/2002), David Carter (Not Started, 10/15/2003), Rohit Gune (Completed, 10/15/2002), Cindy Kline (Completed, 7/15/2003), Jennifer Loft (Not Started, 9/15/2002), Kim Masters (Employee Submitted, 10/15/2002), Linda Matthew (Not Started, 10/15/2003), Karen Nation (Not Started, 10/15/2002), Chris Paulson (Completed, 7/15/2003), Nicholas Ward (Not Started, 10/15/2002), Randy Young (Not Started, 4/15/2003).
- Delegated Approvals:** A table with columns: Name, Period, Type, Status. Data row: Kim Masters, Q4 2002, Objectives, ! Employee Submitted.
- 360-degree Evaluations:** A table with columns: Name, Period, Status. Data rows: Ed Abbo (2002, ! In Progress), Taylor Wang (2002, ! Not Started).

Figure 4. Performance Management Dashboard

This topic is included as part of [“Process of Setting Up Objectives and Reviews”](#) on page 20.

## Related Topics

- [Navigating the Manager’s Performance Dashboard](#) on page 36
- [Approving and Declining Submitted Performance Reviews](#) on page 39
- [Delegating a Performance Review](#) on page 38

## Navigating the Manager’s Performance Dashboard

In addition to providing links to the manager’s individual performance views, the manager’s performance dashboard provides links to the performance of direct reports and next-level direct reports. The Delegated Approvals list shows all approvals that are delegated to other managers, the type of delegation (objectives or review approvals) and the status of the delegated approval. The 360-degree Evaluations list shows the status of the scheduled evaluations.

The left navigation bar provides links to other screens and views that the manager can use to manage objectives, performance reviews, and analyses of his team's performance. [Table 4](#) describes some of the performance screens that can be accessed using the navigation bar.

Table 4. Performance Management Screens

Screen	Description
My Team's Objectives	An explorer tree of the team's hierarchy. The objectives of the selected team member are displayed at the right of the explorer tree.
All Employees Objectives	An explorer tree showing the hierarchy of all employees in the organization. The objectives of the selected employee are displayed at the right of the explorer tree.
Corporate Objectives	Displays the organization's high-level goals. The Quick Picks list provides navigation links to related objectives such as an executive summary, core values, and frequently asked questions.
My Performance	Provides a history of objectives and reviews for the manager, including the status, overall rating, and whether the review is acknowledged. Click the links for each period to navigate to details for each performance period.
My Team's Performance	Lists the manager's reports and provides a performance history and status for each report. Click the Last Name link for the employee to view employment history. Click the Period link to view the details of the direct report's performance for each period.
Department Status Report	Provides an overview of the status of each manager's reviews, such as how many objectives and reviews are due, how many have been completed, and so on. The objectives and review status for each of the manager's direct reports is also displayed. The manager can click the Name link for each direct report and review the status of that manager's direct reports.
Ratings Distribution Report	Provides a Ratings Distribution matrix for each of the manager's direct reports for periodic and annual reviews.
Employee by Rating Report	Lists the manager's direct reports and shows the distribution rating for each for annual and periodic reviews and whether or not the distribution rating is approved.

Table 4. Performance Management Screens

Screen	Description
360-degree Evaluation History	Lists the employees that are scheduled for a 360-degree evaluation, when the evaluation occurs, and the status of the evaluation.
My Key Performance Indicators	Lists the Key Performance Indicators selected by the employee.
My Team's Key Performance Indicators	Lists Key Performance Indicators shared by the employee and the employee's team.
Objectives Scorecard	Analytics Scorecard showing values for objectives.
Review Scorecard	Analytics Scorecard showing values for reviews.

This topic is included in [“Process of Setting Up Objectives and Reviews” on page 20](#).

**Related Topics**

- [Performance Management for Direct Reports on page 35](#)
- [Delegating a Performance Review on page 38](#)
- [Approving and Declining Submitted Performance Reviews on page 39](#)

## Delegating a Performance Review

Managers can delegate a performance review and then check the status of each delegated review from the Performance Dashboard. Review managers can only delegate a review to another review manager, and a second-level review manager can only delegate reviews to another second-level review manager.

Managers can preview the status of delegated reviews using the Delegation Indicator on the Performance dashboard.

This task is a step in [“Process of Setting Up Objectives and Reviews” on page 20](#).

***To delegate a review to another manager***

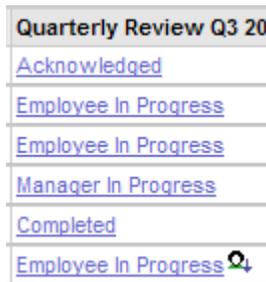
- 1 From the Performance Management Dashboard, locate the employee in the My Direct Reports list.
- 2 In the Employee record, click the link Review Status.

For example, the column might be labeled Quarterly Review, and the link might reflect the status Employee In Progress.

The Review page for the employee appears.

- 3 From the Review page, click Delegate Review Manager, and from the Delegate dialog box, select the manager.

As the following figure shows, a Review Delegated icon appears next to the Review link in the manager's Performance Management Dashboard.



## Approving and Declining Submitted Performance Reviews

After an employee completes a self-assessment, the employee submits the review to a manager who then reviews the employee's achievements against objectives. The manager adds comments to the self-assessment, provides a rating, and then approves or declines the review.

In a multitiered organization, if the manager accepts the review, it is automatically moved to the next-level manager for approval. In some organizations, multiple managerial reviews are not required, and an approved review is returned to the employee for review, discussion, and acknowledgement.

This task is a step in ["Process of Setting Up Objectives and Reviews" on page 20](#).

### *To approve or decline a submitted review*

- 1 Log in as a manager, and then navigate to the Performance Management Dashboard.
- 2 In the My Direct Reports list, select the employee and click the Review Status link.  
The status of the review should be Employee Submitted or Manager in Progress.
- 3 On the Review page, click the Objectives view tab to view the employee's objectives.
- 4 For each objective listed, add your comments in the manager results textbox and assign a rating in the rating field.
- 5 (Optional) If your company decides to use the skills component on a review, a manager can click the Skills view tab, and add skills.  
The skills profile is updated with new skills and skill levels when the review is completed.
- 6 Click the Review Summary tab.  
The calculated rating from all the individual scores entered for each objective appears.

- 7 Using the calculated rating score as a reference, enter the final rating for the employee in the Overall Rating field.
- 8 Click the Comments view tab, and then add overall review comments.
- 9 Click Approve or Decline.

After the review is approved, the manager's comments are released for employee viewing.

If the review is declined, the manager's comments are not visible to the employee. The employee must resubmit the review to the manager after revision.

## Copying Previous Objectives (End User)

An employee's objectives may not change much from period to period. In this case, when defining objective for a new period, an employee can copy a similar objective from the previous period and edit the old objective as needed.

This task is a step in ["Process of Setting Up Objectives and Reviews"](#) on page 20.

### *To copy a previous objectives to the new period*

- 1 Navigate to the Objectives screen, and click Copy Previous Objectives.  
A list of objectives sorted by date appears.
- 2 Select the previous objective you want to copy, and then click OK.  
The objective is automatically copied to the current period's list of objectives.
- 3 In the Objectives list, edit the copied objectives to reflect the requirements for the current period.

## Adding Performance Assessments During the Cycle (End User)

Managers and employees do not need to wait to the end of the performance cycle to begin entering performance assessment comments for objectives.

Immediately after a new objective is created, the comments field becomes available for employees and managers to start detailing progress and entering other objective-related information. The comments remain private until an employee submits the review to the manager. At this point, the employee comments are visible to the manager but the manager's comments are not yet visible to the employee.

For example, an employee might have an objective that requires completing a project by a certain date. As soon as the employee meets the objective, the employee can navigate to the objective and enter details about the achievement. When the company-mandated self-assessment period begins, the employee can add any remaining details in the up-to-date self-assessment.

At the same time, managers can also add their own notes on performance by direct reports during the performance cycle. When the review process begins, managers who have routinely recorded achievements by direct reports have the data they need to do the assessment.

## Tracking Progress on Objectives (End User)

Employees can update the progress on each objective at any time during the objectives and reviews cycle. During the employee's review, the manager can modify the progress value to reflect the manager's assessment of progress towards achievement of each goal.

### *To update the status of an objective*

- 1 Navigate to the Performance Dashboard, and select an objective.
- 2 Enter your assessment for the objective in the Employee Results field.
- 3 In the Progress Status field, select the appropriate progress value.

This status appear in graphic form next to the objective in the All Employee Objectives list.



# 4

## Working with Ratings Distributions

Siebel Ratings Distribution is an extension to the compensation planning tool that further refines the performance management process. With this capability, managers can make sure that they meet the ratings distribution guideline defined by their organization and provide a set of ratings that are consistent across different business units.

This section describes the Ratings Distribution process. It includes the following topics:

- [About Ratings Distribution Adjustments](#)
- [Process of Working with Ratings Distributions](#)
- [Specifying Review Periods for Ratings Distributions](#)
- [Compensation and the Ratings Distribution](#)
- [Performance Reviews and Example Ratings Distribution Timeline](#)
- [Adjusting and Submitting Team Ratings](#)
- [Rolling Up and Rolling Down Compensation Plans](#)
- [Submitting Compensation Plans for Ratings Distribution Approval](#)
- [Ratings Distribution and Plan Approvals](#)

### About Ratings Distribution Adjustments

Large companies often use a rating distribution curve process to prevent inflation of ratings between different managers and business units, and to make sure employees are scored in a consistent and equitable manner across all of the organization's business units.

The ratings curve encourages good management practices by requiring managers to objectively evaluate each employee's performance in relation to peers in similar job functions, and to distinguish individual performance achievers within a team.

The ratings distribution process also may be administered in conjunction with a discretionary organization-wide compensation program that includes budgeted compensation plans for each manager.

The organization can use the ratings distribution process as a tool to determine how proposed merit, bonus and stock distribution recommendations support the organization's total compensation strategy, and how the proposed company-wide compensation package compares to findings within a competitive labor market.

Table 5 shows an example that defines each rating category and its ratings distribution percentage.

Table 5. Sample Rating Definition and Distribution Curve

Rating	Definition	% Employees	Tolerance
4.6-5.0	Substantially and consistently exceeds performance expectations.	10%	5%
4.0-4.5	Exceeds performance expectations.	25%	5%
3.0-3.9	Successfully meets performance expectations.	50%	5%
2.0 - 2.9	Room for improvement. Newly hired or newly promoted employees may fall into this category.	10%	5%
1.0 - 1.9	Does not meet performance expectations.	5%	5%

As Table 5 shows, scores of 4 and 5 are used to differentiate those relative few employees who consistently exceed their objectives. A rating in the 3 range, which 50% of employees receive, means that the employees successfully met performance objectives. A score of 2 indicates that the employee must develop some areas of performance to become more successful, or that the employee is new to the job role. A score of 1.0-1.9 is limited to approximately 5% of employees who do not meet performance expectations. In this example, a ratings tolerance of 5% is specified for each ratings category. Using Siebel Tools, you can modify these values to build a specific rating distribution guideline for your organization.

The overall curve is typically managed at the senior executive level, with each business unit meeting the distribution guidelines during review periods. Groups with less than 50 employees may not be able to meet the distribution curve. In these cases, distribution targets are typically met at the next management level within the department. Managers with larger groups must attempt to meet the curve requirements to maintain integrity during the roll up of ratings that join the curve at the next business unit level. A typical rollup scenario might include first line managers setting ratings, and submitting the ratings to the next-level manager. The next-level manager modifies and consolidates the ratings into a broader (regional) distribution, and then submits the distribution to an executive level manager, such as a vice president.

As a best practice, managers are advised not to assign a rating that is inconsistent with performance simply to meet a distribution curve. To reinforce this guideline, managers are required to justify the ratings assigned to their direct reports so that the organization's executive staff can make appropriate ratings decisions when managing the curve rollup in a hierarchical manner at the organization level.

The ratings distribution curve process can be administered separately from the compensation process. For example, a company might rate its employees twice a year, and only provide performance-based compensation annually. At the midpoint of the year, managers assign ratings based on the distribution curve in a process that is not tied to a compensation budget. During annual reviews, the ratings for the 6-month and 12-month reviews are averaged and associated with a budgeted compensation plan.

# Process of Working with Ratings Distributions

The following lists show the procedures that administrators and managers typically perform to set up and use Ratings Distributions. Your company may follow a different process according to its business requirements.

## Administrator Procedures

To set up ratings distributions, perform the following procedures:

- [1 Defining Compensation Planning Cycles on page 82.](#)  
Create a new planning cycle associated with the review period to be evaluated.
- [2 Creating a Compensation Budget and Budget Type on page 78.](#)  
If the ratings distribution process is not linked to a compensation budget, create and calculate a placeholder budget in which the budget type or employees are not specified.
- [3 Associating a Compensation Component with a Planning Cycle on page 83.](#)  
If the planning cycle involves compensation, add the compensation components required for the compensation cycle.
- [4 Specifying Review Periods for Ratings Distributions on page 45.](#)  
Create a compensation plan and configure the ratings distribution option.

## Manager Procedures

To work with ratings distributions, perform the following procedures

- [1 Adjusting and Submitting Team Ratings on page 47.](#)  
Managers review the ratings distributions for the team, and adjust the ratings as necessary.
- [2 Rolling Up and Rolling Down Compensation Plans on page 49.](#)  
Managers can roll up and roll down the compensation plans of direct reports in the organization's hierarchy.
- [3 Submitting Compensation Plans for Ratings Distribution Approval on page 50.](#)  
Managers submit compensation plans for Ratings Distribution Approval.

# Specifying Review Periods for Ratings Distributions

As an administrator, you create a compensation plan and configure the ratings distribution option by specifying the review periods to be included in the ratings adjustments process.

This task is a step in ["Process of Working with Ratings Distributions" on page 45.](#)

*To specify review periods for ratings distributions*

- 1 Navigate to the Administration - Compensation Planning screen.
- 2 Choose Ratings Distribution from the visibility filters.
- 3 In the list, choose a compensation plan and complete the fields in the form.

The following table describes the fields.

Field	Description
Annual Period	Specifies the annual review year that is being adjusted.
Period 1-4	Specifies the periodic reviews that are displayed in the ratings adjustments view.
Adjusted Period	The actual period that is used to modify the ratings. The adjusted period is displayed in the ratings adjustments view and shows the number of employees in each rating category.
Period edit flag check box	Used to mark a period as being editable by the managers. Periods must have a status of PDA (Pending Distribution Approval) to allow editing.

## Compensation and the Ratings Distribution

When managers submit the reviews, reviews are assigned a status of PDA (Pending Distribution Approval). The status for the performance reviews does not change until the organization finishes the Rating Distribution process.

If employees receive compensation for performance and a budget is provided, Siebel Objectives and Reviews interprets the ratings and calculates suggested compensation amounts according to compensation plan guidelines. The compensation plan, a budgeted set of merit, bonus, stock, or promotion recommendations covering the manager's team of direct and indirect reports, is rolled down to a first-level manager by the supervisory manager.

The ratings-based compensation amounts for each employee appear in the MyTeam's Compensation list. The view lists each employee's rating, the performance range, a rating guideline indicator for each record, and navigation links to each employee's performance review.

Managers can edit individual employee objectives scores, comments and weights during the rating adjustment process period, but they cannot modify the overall score. Modifying the overall score can only occur by using the compensation planning tool as part of the ratings adjustment process. The compensation tool flags those manager ratings that are higher or lower than the mandated guidelines for the rating distributions.

Managers can also see the latest adjusted rating in Objectives and Reviews while reviews are in PDA status. If a change in the rating occurs, the compensation guidelines for individual employees are automatically recalculated.

After scores and compensation amounts are adjusted, the manager's compensation plan is submitted to the next-level manager for approval.

The Pending Distribution Approval status changes to the Manager to Release status when the compensation cycle is completed. To complete this process, the administrator must release the reviews from within the Administration - Compensation Planning screen's Compensation Plan Rules Administration view (Planning Cycles visibility filter). The compensation plan must be closed by the final approver before the administrator can click the Release Reviews button.

## Performance Reviews and Example Ratings Distribution Timeline

An organization typically uses a timeline similar to the following example during a review period that includes a ratings distribution. This example includes dates for an Q1 review period.

- **Jan. 8.** During a company performance review period, each employee completes a self-review and submits the review by a specified date to the employee's manager.
- **Jan. 19.** The manager approves the employee's self-review, completes the manager's review of the employee and assigns an overall rating to the employee. When the manager submits the review, the review status becomes PDA.
- **Jan. 22.** At the established deadline, the administrator locks the remaining reviews to PDA status, and managers review ratings distribution using the compensation planning application.
- **Jan. 23.** This process continues until the final approver manager reviews and approves the rating distribution.
- **Jan. 23-Feb. 6.** Compensation plans are released, and managers conduct performance review meetings.

## Adjusting and Submitting Team Ratings

From the Compensation Planning screen, a manager can view compensation plan and budget details, and check and adjust the direct report's rating with overall team ratings distribution. [Figure 5](#) shows an example of the Compensation Planning screen, with the Performance view tab exposed.

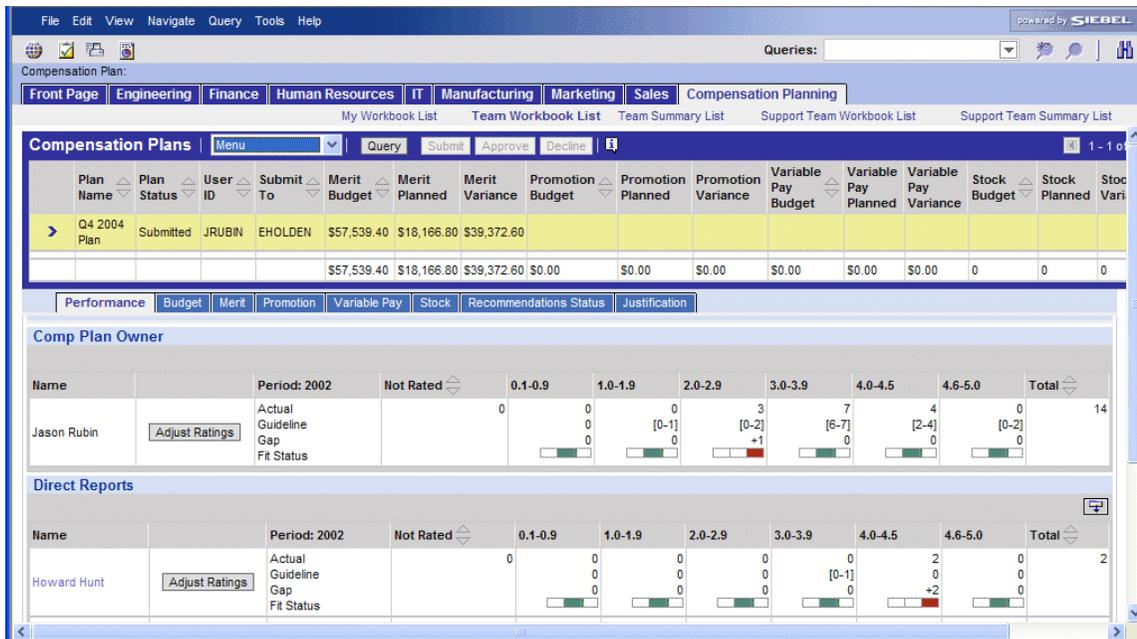


Figure 5. Compensation Planning Screen with Performance View

The owner of the selected compensation plan appears, along with a hierarchical list showing the total number of direct and indirect reports for the manager. For example, as Figure 5 shows, compensation plan owner Jason Rubin has 14 reports, one of whom is Howard Hunt, a manager with two reports. The selected compensation plan identifies the next manager in the approval process for the submitted compensation plan, in this case, Ed Holden.

For each manager reporting to Rubin, the record shows the total number of employees reporting to that manager, as well as the number of employees in each ratings range (Actual). The Guideline value is expressed as the number of employees that must be in the ratings range to be in compliance.

Siebel Objectives and Reviews calculates each rating range by adding and subtracting a tolerance value from the expected number of employees in the range. You can configure the rating ranges, guidelines and tolerances using Siebel Tools. Tolerances are usually unique for each range. For more information, see *Using Siebel Tools*.

For example, an organization has determined that 50% of its employees should be in the 3.0-3.9 range, with a tolerance of 2%. If a manager has a total of 53 employees, 26.5 employees should be in the 3.0-3.9 range. If the tolerance value for the range is 1.5, subtracting that number from 26.5 sets the low end of the range at 25. Adding 1.5 to 26.5 establishes the high end of the range at 28. Consequently, between 25 and 28 of the manager's direct reports should be rated in the 3.0-3.9 range.

The Gap value is the difference between the guideline and the actual number of employees actually in the rating category. The gap is displayed numerically (plus or minus), and the Fit Status is expressed as a color-coded indicator that flags ratings that are over or under the guideline for the ratings category. For example, as [Figure 5](#) shows, Jason Rubin has rated three reports so that they appear in the 2.0-2.9 ratings category, and the guideline specifies 0-2 employees. The ratings category is flagged as being out of guideline, and a +1 appears, indicating that the category contains an extra employee. To maintain the integrity of the ratings curve, Rubin must adjust the rating for one employee so that the employee's score falls into a ratings category that can accommodate another employee.

These tasks are a step in ["Process of Working with Ratings Distributions"](#) on page 45.

### ***To adjust the curve fit ratings of direct reports and submit the compensation plan***

- 1 Navigate to the Compensation Planning screen > Team Workbook List view.
- 2 In the Compensation Plans list, select the compensation plan, and click the Performance view tab.
- 3 Review the ratings distribution for each direct report to identify variances in the distribution curve.

If the direct report is a manager with direct or indirect reports, an Adjust Ratings button appears adjacent to the employee's name.

- 4 Click Adjust Ratings.

A list of all direct reports appears. The ratings field is editable for each employees who is included in a ratings category that is not aligned with the curve-fit guideline.

- 5 In the employee record, click in the Review Report field to see the review components and overall ratings for the employee.
- 6 In the Rating field, enter a new rating for the out-of-range employee, and save the change.

This action shift the employee from a flagged ratings category to the category that includes the range for the new rating.

**NOTE:** Managers can only edit the ratings of employees who have submitted their compensation plans to the manager. If a direct report has not submitted a plan, the manager can use the rollup functionality for that employee to control the compensation plan and edit the ratings. If the review status is not PDA, the scores cannot be edited. An employee who is on leave of absence might fall into this category.

## **Rolling Up and Rolling Down Compensation Plans**

Using the rollup and roll-down functionality, managers can access compensation plans that have not been submitted by reporting managers in the hierarchy.

For example, Manager 1 has two direct reports, Managers A and B. Manager B has two direct reports, Manager B1 and Manager B2.

Initially, Manager 1's compensation plan includes the compensation plans for Manager A and Manager B. If Manager 1 selects Manager B in the list and clicks Roll Up, then Manager 1's plan contains list records for Manager B1 and Manager B2. Manager 1 now has ownership of the compensation plans; when Manager A and B log in, they cannot access their plans.

If Manager 1 clicks Rollup All, then his plan contains the plans of Manager A and B, and Managers B1 and B2.

When Manager 1 clicks Roll Down, the process is reversed, and Managers A and B can again access their plans.

### ***To roll up a direct report's compensation plan***

- 1 Navigate to the Compensation Planning screen > Team Workbook List view.
- 2 In the Compensation Plans list, select the plan, and then click the applicable compensation component view.  
For example, click the Merit view tab.
- 3 From the compensation component list, click Roll Up or Roll Up All.

## **Submitting Compensation Plans for Ratings Distribution Approval**

When the ratings adjustment process is complete, the manager submits a compensation plan with the manager's team's ratings to the next-level manager for rating distribution approval. The manager must have received all compensation plans from his direct reports before the manager can submit the compensation plan to the next-level manager.

If a first-level manager's plan has not been submitted for approval, the second-level manager can use the Roll Up and Roll Up All buttons to take ownership of those compensation plans and complete the curve fit process for the first level manager's direct reports. This action would be necessary, if, for example, a second-level manager completes the ratings process when a first-level manager is unavailable.

After submission, the reviews and rating distribution cannot be edited by the submitting manager, because they are now owned by the next-level manager. The submitting manager can, however, edit and add comments, even when the status is Pending Distribution Approval. The first-level manager can also see changes to ratings for his direct reports made by the next-level manager using the compensation planning tool.

This task is a step in ["Process of Working with Ratings Distributions" on page 45](#).

### ***To submit a compensation plan for approval***

- 1 Navigate to the Compensation Planning screen > Team Workbook List view.
- 2 In the Compensation Plans list, select the compensation plan, and click Submit.  
The plan is automatically routed to the user identified in the Submit To field.

## Ratings Distribution and Plan Approvals

When the upper-level manager navigates to the Compensation Planning screen, the manager sees a list of compensation plans that have been submitted by direct reports, as well as the upper-level manager's own plan. The Budget view shows the budgeted amount, the planned compensation and the variance for each compensation component (Merit, Promotion, Variable Pay, and Stock) within the selected compensation plan.

From the Compensation Plans list, the Approve, Decline and Submit buttons are active, according to the state model. If the next step is to submit a compensation plan to the next level of management for approval, the Submit button is active, and the Approve and Decline buttons are inactive. If the next step is to approve or decline a compensation budget submitted by a reporting manager, Approve and Decline buttons are active, and the Submit button is inactive.

The supervisory manager clicks the Performance view tab to check the ratings curve fit for the submitting manager's direct reports. If a normal ratings distribution is in place, the distribution of compensation falls within the budgeted amount of compensation, and compensation plan can be approved. After a compensation plan is approved, it is no longer editable.

If the curve fit is out of line with the organizations ratings distribution curve, the upper-level manager can take the following actions:

- **Decline the compensation plan.** Ownership reverts to the submitting manager who adjusts the ratings for his or her direct reports and then resubmits the revised compensation plan to the approving manager.
- **Modify the ratings to fit the curve.** Because the upper-level manager owns the compensation plan submitted by a subordinate manager, the upper-level manager can opt to adjust the ratings for the first-level manager's team, as necessary, using the rollup functionality.



# 5

## Setting Up Competency Management

Siebel Competency Management is a module that is used by managers to associate skills with job profiles, by Training Administrators to associate specific skills with training objectives, and by employees to associate skills with their employee profile.

This chapter describes setting up and managing competencies. It includes the following topics:

- [Assessment of Skills and Achievements for Competency Management on page 53](#)
- [Scenario for Competency Management on page 57](#)
- [Process of Setting Up Competency Management on page 57](#)
- [Creating a Ratings Scale for Competency Skills on page 58](#)
- [Creating Skills and Assigning a Rating Scale on page 58](#)
- [Creating Job Profiles on page 60](#)
- [Associating Competencies with a Job Profile on page 61](#)
- [Creating Career Path Options for a Job Profile on page 62](#)
- [Syncing Required Skills for Employee Competency on page 62](#)
- [About Competencies and Assignment Manager on page 63](#)

### Assessment of Skills and Achievements for Competency Management

Your Siebel application saves employee information within groups of records. When they are combined, these records make up an employee profile.

An employee profile includes information that identifies an employee, lists the employee's proficiencies and experience, and provides information on the employee's qualifications, honors, rewards, and past education.

Also included in an employee profile are sets of skills and abilities that are associated with an employee. These sets of abilities, called *competencies*, are used within Competency Management System to help measure the abilities and achievements of employees. Competencies might be employed in the following ways:

- **Training and Development.** Skills and competencies are associated with courses and classes offered through the Siebel Training application. When employees successfully complete a course, their profiles are automatically updated with the skills associated with the course.

- **Career Management.** The Career Management feature allows employees to view their job profiles, browse potential career paths, and define their next career step. The skills associated with an employee's profile are compared to the skills associated with jobs in the employee's career path. The Competency Management feature calculates the skills gaps that exist between an employee and other job profiles. The skill gap analysis indicates skill deficiencies and provides employees with indications of which skills they need to acquire. Employees can also review the recommended courses they can enroll to close those gaps.
- **Team Competency Planning.** Using Siebel Competency Management, managers can direct the acquisition of competencies and skills within their groups. Managers can analyze their team's current skill set, the required skill set based on the employee's job profile and can view individual competency profiles of team members. The skill gap analysis of a team's current strengths and weaknesses allows managers to provide training suggestions or define future hiring requirements. Managers can set competency objectives and monitor each employee's progression towards these goals.
- **Performance Management.** Competencies can be included in the formal performance management process. Employees can include specific competencies in their performance setting process and managers can review and access these ratings as part of the overall assessment process.

## Employee Information Management and Competencies

The employee profile repository stores information about each employee in an organization. The views associated with an employee record (Administration - User screen > Employees view) allow you to add the following types of information to build a profile of the employee that contains both personal data, and professional data that may have a bearing on skills and competencies.

### Employee Credentials

The following Employee views allow you to add and manage the certifications, honors, and awards the employee has achieved, as well as note the employee's professional memberships.

- **Certification.** Use this view to enter details about certifications an employee has received, the institution attended, and date of certification.
- **Honor/Award.** Use this view to enter details about honors and awards an employee has received, the institution that presented the honor or award, date received, and additional comments.
- **Membership.** Use this view to enter information about professional memberships the employee holds, active status, starting and ending dates, and whether the membership is company related.

### Employment Experience and Education Information

The following views allows you to view and manage the resume of each employee in an organization. You can restrict visibility to select groups of employees.

- **Education.** Use this view to enter details about an employee's education, including type of education, years of study, degree received, graduation date, and the institution where the employee studied.
- **Past Work Experience.** Use this view to record the employee's previous job experience, such as title, company name, industry, business unit, and starting and ending dates.

## Employee Competency Information

The following views allow you to manage and view an employee's skills. Managers can use this view to track skills gaps and build teams based on project skill needs.

- **Assignment Skills.** Use this view to enter the skills required to complete an assignment and any additional comments.
- **Competency.** Use this view to enter information on competencies the employee has achieved or needs to achieve, including the required level of competency, skill gap, parent skill, and root category for the skill. You can also enter the date the competency requirement was fulfilled, description, and critical degree of the competency.

## Employee Skill Utilization

The following views allow you to manage employee assignments and use an employee's skills:

- **Employee Assignment Rules.** Use this view to record assignment rules and filters that apply to an employee, along with the activation date, expiration date, and a description of the rule.
- **Employee Availability.** Use this view to enter an employee's availability for assignment and the project and account the employee is assigned to with starting and ending dates and estimated hours required.
- **Employee Exception Hours.** Use this view to enter any exception hours an employee works, the dates worked, type of exception, and reason for exception.
- **Employee Utilization.** Use the two drop-down lists in this view to display Utilization or Time Sheet Details and to select the type of chart display for this information—two-dimensional or three-dimensional line, bar, or stacked bar charts.

## Other Job-Related Information

The following views allow you to manage employment information and job tools and assets issued to the employee:

- **Job Information.** Use this view to view and enter information about the employee's employment status, compensation eligibility, and performance statistics.
- **Sensitive Job Information.** This read-only form provides compensation details for the employee, including salary, salary plan, bonus target percent, and so on.
- **Service Details.** This view includes information on the employee's service requirements, such as the cost per hour, shift schedule, and whether the employee is compensated for overtime hours.

The information stored in the employee profile repository is used by other Siebel applications and modules. For example, the skills in an employee's profile are used by Competency Management to calculate skills gaps, which helps to identify areas in which an employee needs to update his or her skills.

You can restrict visibility of an employee profile view based on the responsibilities of the employee. For more information about visibility and responsibilities, see *Applications Administration Guide*.

## Related Topics

- [Competencies, Categories, and the Skills Hierarchy on page 56](#)
- [Scenario for Competency Management on page 57](#)

## Competencies, Categories, and the Skills Hierarchy

Using Competency Management, you can develop multilevel hierarchies of categories and skills relevant to your organization's industry. You build a hierarchy by associating skills with categories through parent-child relationships. Defining skills involves setting up the necessary categories.

As illustrated in [Figure 6](#), the Competency Administration screen provides a Skills Hierarchy on the left, which is represented by a folder. Expanded below the folder are several skills categories, which are represented by file icons. The skills categories include other categories and skills. The right section of the screen includes the Category/Skill list, which shows records based on the selection in the Skills Hierarchy. Below the Category/Skill list is the Child Items list, which includes the records associated with the child records.

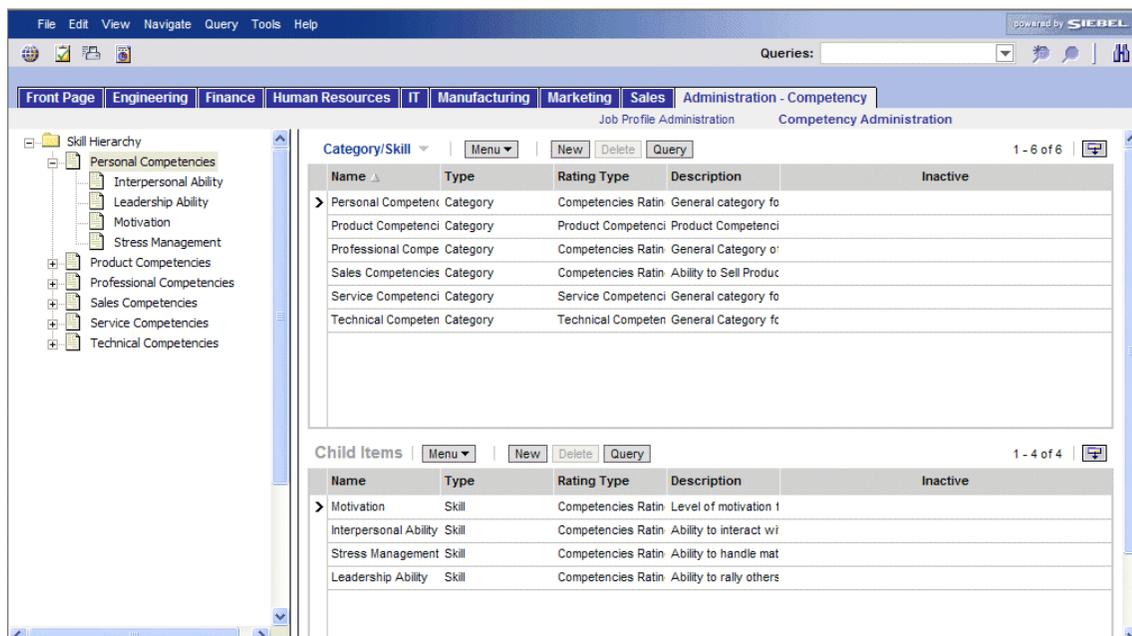


Figure 6. Competency Management Hierarchy

# Scenario for Competency Management

This scenario provides an example of a process performed by an administrator and an HR manager. Your company may follow a different process according to its business requirements.

## Administrator

An administrator at a software company is in charge of setting up and maintaining the organization's competency management system. The administrator's organization is developing a new product line with three new management positions to manage the new product. The executive team outlines the skills and requirements for each position and delivers the requirements to the administrator.

The administrator reviews the preconfigured set of more than 1,000 skills in the Skills Library, and then creates some additional skills and categories required by the organization. Following guidelines developed by the organization, the administrator defines a hierarchy of skills, providing a top-down approach from very generic skills to very specific and detailed skills.

The administrator then creates job profiles, which characterize all available job positions within the software organization. The manager links the job profiles together and associates competencies to the job profiles to establish a career development plan, which can be used by the organization to structure the personal career development of each employee.

## Manager

A new employee is hired into one of the new management positions. The Human Resources manager updates the employee's competency profile using the information gathered from the employee's application, resume, and notes from her interview. Either the manager or the administrator synchronizes the required competencies of the new position with the competency profile of the new hire.

# Process of Setting Up Competency Management

This process lists the tasks typically performed by the administrator setting up a ratings scale and skills hierarchy for competency. Your company may follow a different process according to its business requirements.

## Administrator Procedures

Perform the procedures in the following list to administer competencies:

- 1 [Creating a Ratings Scale for Competency Skills on page 58](#)
- 2 [Creating Skills and Assigning a Rating Scale on page 58](#)
- 3 [Creating Job Profiles on page 60](#)
- 4 [Associating Competencies with a Job Profile on page 61](#)
- 5 [Creating Career Path Options for a Job Profile on page 62](#)

6 [Syncing Required Skills for Employee Competency on page 62](#)

## Creating a Ratings Scale for Competency Skills

As the administrator, you must create the rating scale that is assigned to each skill in a Skills Hierarchy. For Siebel Competency Management, a rating scale can be defined for a different skill or shared across numerous skills. Ratings are used to define employee skill levels and to determine skill gaps.

This task is a step in [“Process of Setting Up Competency Management” on page 57](#).

### *To create a ratings scale and values for skills*

- 1 Navigate to the > Administration - Performance Management screen > Review Configuration view.
- 2 From the visibility filters, choose Rating Scales.
- 3 In the Ratings Scales list, create a new ratings scale, and then provide a name, description, and type.

For example, the name might be Competency Ratings Scale, and the type is Competency Management.

- 4 In the Ratings list, create the required records to define the scope of the competency.

The following table provides an example of a competency ratings scale.

Name	Description	Rating
Low	Beginner	0
Low-Medium	Close to Adequate	25
Medium	Adequately Completed	50
Medium High	Above Adequate Level	75
High	Achieved Full Mastery	100

## Creating Skills and Assigning a Rating Scale

An administrator creates a hierarchy of skills in Competency Administration. The skills hierarchy can have a hierarchy consisting of multiple levels. Related skills are grouped logically, using categories and subcategories. Each skill is linked to a rating scale and a description of the skill.

This task is a step in [“Process of Setting Up Competency Management” on page 57](#).

## Creating Skills

A skill is a consistent demonstrated level of proficiency in an area of expertise that an employee possesses or wants to achieve. For example, Oracle DBA, Presentation Skills, Leadership Ability, and Siebel Administration are valid skills that an employee can attain. Some skills are subjective and are based more on the judgment or discretion of a manager. Other skills are objective and are based on an employee's successful completion of specific goals. Administrators can create and edit the skills that are used for competency management, and deactivate skills that are no longer needed.

### To create a Skill/Category

- 1 Navigate to the Administration - Competency screen > Competency Administration view.
- 2 In the Skill Hierarchy explorer, select a parent category.
- 3 In the Category/Skill list, add a new record, and then complete the fields.

The following table describes the fields in the category/skill record.

Field	Comments
Name	The name of the category.
Type	Indicate the type of record you are creating (Category or Skill).
Rating Type	The appropriate rating scale.
Description	A description of the category.
Inactive	A check mark indicates that a category or skill is inactive. Inactivating or activating a root category does not affect the subcategories and skills within the category.

### To create a child category

- 1 In the Skill Hierarchy explorer, select a parent category.
- 2 In the Category/Skill list, choose the skill or category.
- 3 In the child items list add a new record, and then complete the fields.

## Removing a Skill

For data integrity reasons, categories and skills cannot be deleted from the system. However, you can set a flag to inactivate categories and skills, so that they cannot be accessed by employees.

### To set the inactive flag for a category or skill

- 1 In the Skill Hierarchy explorer, select a category or skill.
- 2 In the Category/Skill list, select the record, and click the Inactive check box.

## Assigning a Rating Scale to a Skill

After you create a rating scale with values, you can assign the rating scale to skills. For more information on creating rating scales, see [“Creating a Ratings Scale for Competency Skills” on page 58.](#)

### To assign a rating scale to a skill

- 1 Navigate to the Administration - Competency screen > Competency Administration view.
- 2 In the Skills Hierarchy, select the Category/Skill.
- 3 In the Rating Type field, assign a rating scale of type Competency Management.

## Creating Job Profiles

A *job profile* is a collection of job-related information that defines the purpose, responsibilities, and requirements of a specific job role. In the process of defining a job profile, you specify the required competencies by associating skills from the competency library with a job profile. These required competencies allow managers to determine whether employees meet the required skill levels for specific jobs.

It is important to associate the appropriate skills and minimum skill levels with job profiles so that employees, managers, and administrators can integrate skills analysis and management across the entire work force.

Job profiles can be imported to Competency Management using EAI. For more information about importing job profile information using EAI, see *Overview: Siebel Enterprise Application Integration*. Job profiles can also be created using the administration screens.

To create a job profile, the relevant job code, job family, salary grade, EEO Category, and FLSA must already exist. For more information, see [Chapter 6, “Setting Up Compensation Planning.”](#)

This task is a step in [“Process of Setting Up Competency Management” on page 57.](#)

### To create a job profile

- 1 Navigate to the Administration - Competency screen > Job Profile Administration view.  
**NOTE:** Before you create a new job profile, make sure the job profile you want to create does not already exist. Query the Job Profile list using the name of the job profile you want to create. If no records are returned, create the new job profile.
- 2 In the Job Profile list, add a new record, and then complete the fields in the More Info form.

The following table describes some of the preconfigured fields. Your Human Resources organization may want to track different fields; those fields should be configured when the application is deployed.

Field	Comments
Job Profile Name	The name of the job profile.
Main Purpose	The job designation.

Field	Comments
Essential Functions	A brief description of job duties and functions.
Job Code	The job code associated with the job profile. The Job Code Name and the Job Family fields are automatically populated based on the job code.
Role	Defines the function associated with the job. For example: individual contributor, manager or manager of managers.
Years of Relevant Experience	The employees relevant experience. This value is provided by Human Resources.
Degree of Internal Contact	Estimated time the employee spends interacting with company employees.
Revenue Responsibilities	The revenue for which the employee is responsible.
Travel	An estimate of time spent away from the home office.
Degree of External Contact	Estimated time the employee spends interacting with individuals outside the company. This contact includes interactions with customers, but it may also include vendors or other suppliers. For example, the degree of external contact for a purchasing manager is high.
Operational Budget	The budgeted amount that allows the employee to fulfill job requirements.
Geographic Scope	The geographic area that the employee must manage. For example, a sales manager might be responsible for the southeast region of the country.
Office Equipment/Tools	The tools that the employee requires to perform the job.
Degree of Customer Contact	The amount of time the employee spends with customers.
Total Number of Reports	The total number of reports.

## Associating Competencies with a Job Profile

After the appropriate job profiles are created, you can associate the competencies with each profile. A job profile can be associated with multiple competencies. A competency can also be associated with multiple job profiles.

This task is a step in [“Process of Setting Up Competency Management” on page 57](#).

### *To add a competency to a job profile*

- 1 Navigate to the Administration - Competency screen Job Profile Administration > Required Competencies view.

- 2 In the Job Profiles list, query for a job profile, drill down on the name, and then click the Required Competencies view tab.
- 3 In the Required Competencies list, add a record.
- 4 From the Name field, locate the skill you want to associate with the job profile.
- 5 In the Required Level field, select the skill level required for the job profile.  
For example, if you are associating a product knowledge competency with a Receptionist job profile, you can require a lower level than you would if you were setting up the Customer Support Specialist job profile.
- 6 In the Criticality field, select a rating that indicates the importance of the selected skill for the job profile.

## Creating Career Path Options for a Job Profile

After the appropriate job profiles are created, you can associate them with other job profiles to create career paths. A career path is a hierarchy of job profiles. These associations represent a career path for employees. After several job profiles are associated with one another, employees and managers can use the Career Planning feature to navigate through the hierarchy and determine a career path.

This task is a step in [“Process of Setting Up Competency Management”](#) on page 57.

### *To create a career path option*

- 1 Navigate to the Administration - Competency screen > Job Profile Administration > Career Path Options view.
- 2 In the Job Profiles list, select the job profile, and then click the Career Path Options view tab.
- 3 In the Career Path Options list, add a new record.
- 4 From the Name field, select the job profile you want to designate within the career path.  
The primary flag indicates the next career option for currently selected job profile.

## Syncing Required Skills for Employee Competency

After the job profiles are defined in the system, a synchronization process is required to copy the skills associated with a specific job profile to the personal skill inventory of that employee. Managers and employees can then target skill gaps. When an employee begins a new job, a synchronization is required to populate the employee's personal job profile with the required skills. After the skills are synchronized with the profile, the required levels of proficiency for the job appear, with the Current status uncompleted (blank).

Employees can perform a skills self-assessment to increase their competency level. Manager can also evaluate competencies as part of the performance management process, and also update competencies when the employee takes training.

If the employee changes jobs, the employee is assigned a new job profile and another synchronization is performed by the administrator or manager to obtain the new set of skills required for the job. The previous set of skills that the employees achieved remains in the employee's skill profile. Employees can add additional skills to the profile, using the skills approval process.

This task is a step in ["Process of Setting Up Competency Management"](#) on page 57.

### *To synchronize required skills with a job profile*

- 1 Navigate to the Administration - User screen > Employees view.
- 2 In the Employees list, query for the employee, and then drill down on the Last Name field.
- 3 From the Employee form, click the Competency view tab.
- 4 In the Competency list, click Sync Required Skills.

## About Competencies and Assignment Manager

When competencies are mapped to skills created in Assignment Manager, the skills become another criteria the Assignment Manager engine can use to take an action. As managers update competencies to track employee development, Assignment Manager triggers an action based on this competency information.

For example, a call center agent might take a course that updates the Advance Printer Selling skill. Using Assignment Manager, the system can now route calls from customers who want to buy printers to the agent because this agent is now qualified to handle those calls.

When new competencies are added to the employee profile in the competency management system, a business service is triggered to create the same competency in Assignment Manager for the employee.

The Assignment Manager skills allow the administrator to select competencies that are applied to each employee. Assignment Manager then pulls these competencies from the Competency Management System Skills Hierarchy by means of a selection that points to the Skills Hierarchy:

- Skills attained through training course completion update both the user's Assignment Manager Competencies and the Employee Competencies
- Skills upgraded through Performance Management assessments update both the user's Assignment Manager Competencies and the Employee Competencies.
- Skills upgraded or attained through Skills Self-Assessment in Competency Management update both the user's Assignment Manager Competencies and the Employee Competencies.

The Siebel application pulls the numeric scale in the Competency Management System and adds the scale to it in Assignment Manager as both a High and Low range for that skill, and for that employee.

The Expertise field in Assignment Manager allows a selection of skill levels pulled from the rating scale assigned to the particular skill in Competency Management.

The Assignment Manager functionality supports two levels of skills:

- **Competency.** This level is set in Siebel Tools. The Flat List of All CMS Competencies are transferred to Assignment Manager.
- **Assignment Skill Items.** This level shows all levels below the Parent Skill in Competency Management.

For example:

- CMS: The Parent Skill is Technical Competencies
- CMS: The Root Category is Programming Language Skills
- CMS: The Lowest Node is C++

The result in Assignment Manager is:

- Assignment Manager: Assignment Skill is Technical Competencies
- Assignment Manager: Assignment Skill Items are Programming Language Competencies and C++

For more information about Assignment Manager functionality, see *Siebel Assignment Manager Administration Guide*.

## Integrating the Competency Management System with Assignment Manager

Integration of the Competency Management System with Assignment Manager can be accomplished using two methods:

- Selecting the Sync Competency Mgmt with Assignment Manager option from the menu.
- Activating workflows to automatically perform the synchronization process.

### *To integrate Competency Management with Assignment Manager*

#### 1 Set up Rating Scales.

Create new rating scales and associate Ratings to each rating scale. For more information, see [“Creating a Ratings Scale for Competency Skills” on page 58](#).

#### 2 Set up Competency Skills.

Create new skills. For more information, see [“Creating Skills and Assigning a Rating Scale” on page 58](#).

#### 3 Set up Employee Competencies.

Create competencies for each employee. For more information, see [“Associating Competencies with a Job Profile” on page 61](#).

- 4 Synchronize Assignment Skills from the Competency view.
  - a Navigate to Administration - Competency > Category/Skill.
  - b From the menu, select the option Click Sync Competency Mgmt with Assignment Manager.
- 5 Set up a workflow to integrate the Competency Management System with Assignment Manager.
  - a Navigate to Administration - Business Process > Workflow Deployment.
  - b Select CMS Assignment Manager Sync, and activate the workflow.
  - c Navigate to Administration - Business Process > Policy Groups, and verify that CMS Sync Group appears in the Policy Group list.



# 6

## Setting Up Compensation Planning

Siebel Compensation Planning allows organizations to plan merit-based and promotion-based salary increases, cash bonuses, and stock grants. Organizations can define compensation budgets, guidelines, and eligibility rules. Managers can develop compensation plans for their direct and indirect reports and then submit the plans for multiple levels of approval.

This chapter describes setting up and administering Siebel Compensation Planning. It includes the following topics:

- [Scenario for Compensation Planning on page 68](#)
- [Process of Setting Up Compensation Planning on page 68](#)
- [Creating a Salary Grade on page 69](#)
- [Creating a Salary Plan on page 70](#)
- [Adding a Salary Grade to a Salary Plan on page 70](#)
- [Creating a Job Family on page 71](#)
- [Creating a Job Code on page 72](#)
- [Employee Information Updates for Compensation on page 73](#)
- [Creating Compensation Guidelines on page 73](#)
- [Defining Compensation Eligibility Rules on page 75](#)
- [Defining the Compensation Plan Rollout on page 76](#)
- [Managing Compensation Budgets on page 77](#)
- [Defining Compensation Planning Cycles on page 82](#)
- [Associating a Compensation Component with a Planning Cycle on page 83](#)
- [Generating and Releasing Compensation Plans on page 84](#)
- [Viewing All Compensation Plans on page 85](#)
- [Viewing Employee Compensation History on page 85](#)
- [Navigating the Compensation Planning Screen \(Managers\) on page 86](#)
- [Selecting the Compensation Plan for Rollout on page 88](#)
- [Defining Compensation Changes for Direct Reports on page 88](#)
- [Adding Justification Comments to the Compensation Plan on page 90](#)
- [Tracking Compensation Plan Recommendations Status on page 91](#)
- [Submitting a Compensation Plan for Approval on page 91](#)
- [Approving and Rejecting a Compensation Plan on page 92](#)

- [Assigning Compensation Support Team Members to Employees on page 92](#)
- [Exchange Rates for Compensation Planning on page 93](#)

## Scenario for Compensation Planning

This scenario provides an example of a process performed by a compensation plan administrator and manager. Your company may follow a different process flow according to its business requirements.

### Administrator

Following organizational guidelines, a compensation administrator structures the company's employee and financial information as part of the compensation planning process.

The administrator establishes salary grades and salary plans, defines individual job codes and job family categories, verifies that employee information is up to date, and creates compensation guidelines and eligibility rules. The administrator defines the planning cycles with associated components and then creates budgets for each type of compensation that is included in the compensation plan.

After the definition process is completed, the administrator generates compensation plans for use by each manager participating in the planning process. The administrator reviews the compensation plans as well as the compensation history for each employee in the organization.

### Manager

An organization's marketing director manages eight direct reports who, in turn, supervise numerous direct reports of their own. Each quarter, the organization's directors plan the compensation for each of their direct and indirect reports.

Using Siebel Compensation Planning, the marketing director defines the merit increase for each eligible employee based on guidelines established by the organization. For each employee who is eligible for a promotion, the director selects a new job code for the employee and specifies an increase in salary. The director then gives each eligible employee a percentage of his or her bonus target, based on the most recent annual review rating or another factor that might have been set up by the administrator. Finally, the director allocates a number of stock options to each eligible employee following guidelines based on the annual review rating.

After reviewing the compensation increases, the director adjusts the compensation for several employees to reduce the variance between the amounts allocated and the budget. The director then submits the compensation plan to his manager for approval.

## Process of Setting Up Compensation Planning

The following lists show the procedures that administrators and managers typically perform to set up and use Compensation Planning. Your company may follow a different process according to its business requirements.

## Administrator Procedures

To set up compensation planning, perform the following procedures:

- 1 [Creating a Salary Grade on page 69](#)
- 2 [Creating a Salary Plan on page 70](#)
- 3 [Creating a Job Family on page 71](#)
- 4 [Creating a Job Code on page 72](#)
- 5 [Employee Information Updates for Compensation on page 73](#)
- 6 [Creating Compensation Guidelines on page 73](#)
- 7 [Defining Compensation Eligibility Rules on page 75](#)
- 8 [Defining the Compensation Plan Rollout on page 76](#)
- 9 [Managing Compensation Budgets on page 77](#)
- 10 [Defining Compensation Planning Cycles on page 82](#)
- 11 [Generating and Releasing Compensation Plans on page 84](#)

## End-User (Manager) Procedures

To use compensation planning, perform the following procedures:

- 1 [Viewing All Compensation Plans on page 85](#)
- 2 [Viewing Employee Compensation History on page 85](#)
- 3 [Selecting the Compensation Plan for Rollout on page 88](#)
- 4 [Defining Compensation Changes for Direct Reports on page 88](#)
- 5 [Adding Justification Comments to the Compensation Plan on page 90](#)
- 6 [Tracking Compensation Plan Recommendations Status on page 91](#)
- 7 [Submitting a Compensation Plan for Approval on page 91](#)
- 8 [Approving and Rejecting a Compensation Plan on page 92](#)
- 9 [Assigning Compensation Support Team Members to Employees on page 92](#)

# Creating a Salary Grade

As an administrator, you create salary grades as the first step in establishing salary ranges within the organization.

This task is a step in [“Process of Setting Up Compensation Planning” on page 68](#).

### *To create a salary grade*

- 1 Navigate to the Administration - Compensation Planning screen > Compensation Plan Salary Administration view.

- 2 From the visibility filters, select Salary Grades.
- 3 In the Salary Grades list, add a new record, and then complete the name and description fields.
- 4 Select the check box in the Active field to activate the salary grade.

## Creating a Salary Plan

Salary plans define the salary range as defined by each salary grade. To create the association between an employee and a salary range, a salary plan, and a salary grade is specified for each employee.

This task is a step in ["Process of Setting Up Compensation Planning" on page 68](#).

### *To create a salary plan*

- 1 Navigate to the Administration - Compensation Planning screen > Compensation Plan Salary Administration view.
- 2 From the visibility filters, select Salary Plans.
- 3 In the Salary Plans list, add a record, and then complete the name and description fields.
- 4 In the Salary Plan record, select the check box in the Active field to activate the salary plan.

## Adding a Salary Grade to a Salary Plan

Before you can add a Salary Grade to a Salary Plan, the Salary Grade and Salary Plan records must be created. To modify an existing salary range within a salary plan, create a new effective dated row within the Salary Plan's Salary Grade list.

This task is a step in ["Process of Setting Up Compensation Planning" on page 68](#).

### *To add a salary grade to the salary plan*

- 1 Navigate to the Administration - Compensation Planning screen > Compensation Plan Salary Administration view.
- 2 From the visibility filters, select Salary Plans.
- 3 In the Salary Plans list, select the salary plan.
- 4 In the Salary Grades list, add a record.
- 5 From the Salary Grade field, select a salary grade to include with the salary plan.

## 6 Complete the fields for the salary grade.

The following table describes the fields in the salary grade record.

Fields	Comments
Active	Selecting the check box activates the salary grade.
Currency	The currency code for the salary grade.
Effective Date	The date on which the salary grade is active. The Active check box must be selected for the salary grade to be activated on the specified date.
Max Salary Range	The maximum salary for the salary grade.
Min Salary Range	The minimum salary for the salary grades.
Salary Range 25th Percentile	Enter the 25th percentile salary for the salary grade.
Salary Range 75th Percentile	Enter the 75th percentile salary for the salary grade.
Salary Range Midpoint	Enter the midpoint salary for the salary grade. This value is used to calculate a compa-ratio for the employee.

Repeat this procedure for each salary grade you want to add to the salary plan.

## Creating a Job Family

Job families are created to group job codes that have a common function but may differ in complexity, scope, or level.

This task is a step in ["Process of Setting Up Compensation Planning"](#) on page 68.

### *To create a job family*

- 1 Navigate to the Administration - Compensation Planning screen > Compensation Plan Job Administration view.
- 2 From the visibility filters, choose Job Families.
- 3 In the Job Families list, add a record, and then complete the fields.

The following table describes the fields in the job family record.

Field	Comments
Active	A check mark indicates that the job family is active.
Description	Enter a description for the job family.

Field	Comments
Effective date	The date on which the selected job family becomes available.
Job Family	Enter a name for the job family.

## Creating a Job Code

Job codes are a common attribute in applications used by Human Resources professionals to link employees with specific job attributes defined by your organization and to identify job types and titles. Job code attributes can include a salary grade, job family, Fair Labor Standards Act (FLSA) status, and Equal Employment Opportunity (EEO) category.

This task is a step in ["Process of Setting Up Compensation Planning"](#) on page 68.

### *To create a job code*

- 1 Navigate to the Administration - Compensation Planning screen > Compensation Plan Job Administration view.
- 2 From the visibility filters, select Job Codes.
- 3 In the Job Codes list, add a record, and then complete the fields.

The following table describes the fields in the job code record.

Fields	Comments
Job Code	Unique number for the job code.
Job Code Name	The name of the job code.
Job Family	The Job Family associated with the Job Code. The Job Family must already exist to select it here.
Salary Grade	The Salary Grade associated with the Job Code. The Salary Grade must already exist to select it here.
EEO Category	Equal Employment Opportunity job category of the technical professional. Choose the best-fit category.
FLSA Status	Exempt or nonexempt status for FLSA (Fair Labor Standards Act).
Active	Selecting the check box activates the job code.
Effective Date	The date on which the job code is active. The Active check box must be selected for the job code to be activated on the specified date.

# Employee Information Updates for Compensation

As part of the administrative process, employee job information is verified and maintained for accurate compensation results. Employee job information such as Employment Status, Employee Type, Job Code, Salary, and so on, should be updated on a regular basis to produce accurate results for the compensation planning process.

Make updates to employee job information before creating a compensation plan. Subsequent changes to an employee's job information are not reflected in existing compensation plans.

## Related Topic

[Process of Setting Up Compensation Planning on page 68](#)

# Creating Compensation Guidelines

Siebel Compensation Planning allows organizations to establish compensation guidelines for merit, variable pay, and stock. These compensation guidelines are specific to a salary plan and salary grade combination and can be based on factors such as annual review ratings, company ratio, and salary quartiles. Managers can use these guidelines during the planning process when deciding merit increases, bonus amounts, and stock grants for each employee.

This task is a step in ["Process of Setting Up Compensation Planning" on page 68](#), and includes a number of related tasks.

## Related Topics

- [Associating a Compensation Salary Plan and Grade with the Guideline Table on page 74](#)
- [Defining Compensation Guideline Ranges on page 75](#)

### *To create a guideline*

- 1 Navigate to the Administration - Compensation Planning screen > Compensation Plan Rules Administration view.
- 2 From the visibility filters, select Guidelines.
- 3 In the Guidelines list, add a record, enter a name and description, and then complete the remaining fields.

The following table describes some of the fields.

Field	Comments
Type	The type of guideline. Examples are Merit, Variable Pay, Promotion, and Stock.

Field	Comments
Effective Date	The date the guideline is effective.
Active	Selecting the check box activates the guideline.

## Associating a Compensation Salary Plan and Grade with the Guideline Table

The Guideline Table is used to associate salary plan and salary grade combinations with compensation guidelines and their corresponding factors.

### *To associate a salary plan and grade with a guideline*

- 1 In the Guidelines list, select the guideline.
- 2 In the Guideline Table list, add a new record, and complete the fields.

The following table describes the fields in the guideline table record.

Field	Comments
Salary Plan	The salary plan for which the guideline applies. The salary plan is used in combination with the selected salary grade.
Salary Grade	The salary grade for which the guideline applies. The salary grade is used in combination with the selected salary plan.
Factor 1	<p>The factor used in determining the guideline.</p> <p>Examples are:</p> <ul style="list-style-type: none"> <li>■ Periodic Review. The most recent periodic review rating from Siebel Objectives and Reviews.</li> <li>■ Annual Review. The most recent annual review rating from Siebel Objectives and Reviews.</li> <li>■ Compa-Ratio. The salary and salary range midpoint.</li> <li>■ Salary Quartile. The salary quartile based on the salary range.</li> </ul>
Factor 2	(Optional) A second factor used in determining the guideline.

### Related Topic

[Creating Compensation Guidelines on page 73](#)

## Defining Compensation Guideline Ranges

Guideline Ranges determine the minimum, maximum, and target guideline values for merit, variable pay, and stock awards. For merits and variable pay, the minimum, maximum, and target amounts entered should represent a percentage. For stock, the amounts entered should represent the actual number of shares.

### To set guideline ranges

- 1 In the Guidelines list, select the guideline.
- 2 In the Guideline Table list, select the guideline table.
- 3 In the Guideline Ranges list, add a record, and complete the fields.

The following table describes the fields in the guideline ranges record.

Field	Comments
Factor 1 - Low Value	The low value of the range for the first factor that is considered.
Factor 1 - High Value	The high value for the first factor that is considered.
Factor 2 - Low Value	The low value of the range for a second, optional factor.
Factor 2 - High Value	Enter the high value of the range for Factor 2. There are four preconfigured factors to choose from: <ul style="list-style-type: none"> <li>■ Annual review score</li> <li>■ Periodic review score</li> <li>■ Compa-ratio</li> <li>■ Salary quartile</li> </ul>
Minimum	The guideline minimum amount.
Maximum	The guideline maximum amount.
Target	The guideline target amount.
Default	The default percentage value to be applied when an employee's Factor 1 and Factor 2 combination do not match a row in the table.

### Related Topic

[Creating Compensation Guidelines on page 73](#)

## Defining Compensation Eligibility Rules

Employee eligibility for compensation changes can vary from one compensation type to another, as well as from one planning cycle to the next. You can define eligibility rules to determine which employees are eligible for which types of compensation change. Eligibility rules can also be used to control which employees have budgets calculated for them.

This task is a step in [“Process of Setting Up Compensation Planning”](#) on page 68.

### To create an eligibility rule

1 Navigate to the Administration - Compensation Planning screen > Compensation Plan Rules Administration view.

2 From the visibility filters, select Eligibility Rules.

3 In the Eligibility Rules list of employees, query to find the employees that meet eligibility rule criteria.

The query's resulting list of employees is the eligibility rule. Eligibility rule information is defined for each employee in the More Info form's Eligibility Rules section.

4 From the application-level menu, click Query, and then choose Save Query As (ALT + S) to save the eligibility rule.

In the Save Query As dialog box, enter a name for the eligibility rule, and then click OK.

You can refine the eligibility rule criteria by clicking the menu button and choosing Refine Query.

After an eligibility rule has been saved, you select it from the Planning Cycles and Budgets views.

**NOTE:** Eligibility determines the ability to plan compensation changes for specific employees. You can manually override eligibility for specific employees within a compensation plan by accessing the plan through the All Compensation Plans or All Compensation Plans Across Organizations views.

### Related Topics

■ [Managing Compensation Budgets on page 77](#)

■ [Defining Compensation Planning Cycles on page 82](#)

## Defining the Compensation Plan Rollout

Siebel Compensation Planning allows organizations to select the management levels within the organizational hierarchy that participate in the compensation planning process. The term *plan rollout* refers to the determination and control over which managers participate in the planning process. A compensation plan is automatically created for each manager who participates in the planning process. For more information, see [“Defining Compensation Planning Cycles”](#) on page 82.

Participation in the compensation planning process is defined using Administration - Group > Positions. First, you must identify positions as business unit leaders. Then, you need to specify the number of levels below the business unit leaders that participate in the planning process.

[Figure 7](#) shows an identified business unit with levels. In this example, if John's position (Level 1) is selected as a business unit leader with one level below, then Mark, Jane, and Chris (Level 2) would also have compensation plans created for them. Employees in Level 3 and Level 4 are automatically rolled up into Level 2 compensation plans during the plan creation process.

This task is a step in “Process of Setting Up Compensation Planning” on page 68.

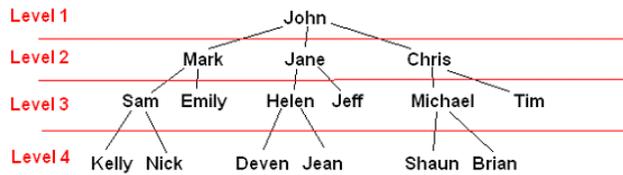


Figure 7. Business Unit with Levels

**To define the compensation plan rollout**

- 1 Navigate to the Administration - Group screen > Positions view.
- 2 In the Positions list, query to find the position of the employee you want to designate as a business unit leader.
- 3 In the Positions Entry form, enter the number of levels that are participating in the planning process in the Compensation Plan Rollout field.

Include the business unit leader and each level below the position in the number that you enter.

The following table describes the values you can use when planning the compensation plan rollout.

Value	Comments
1	Only this position is able to plan.
2 through N	This position and positions N through 1 levels below are able to plan.
NULL	The position inherits plan rollout from parent position.
0	This position cannot plan. Positions below with Compensation Plan Rollout = NULL continues to inherit plan rollout from parent position.
-1	This manager cannot plan. Positions below with Compensation Plan Rollout = NULL cannot plan.

## Managing Compensation Budgets

Compensation planning involves creating and maintaining budgets for each type of compensation.

Before the planning process can begin, you must define a budget for each type of compensation included in the compensation plan. For each compensation type, you can create a logical expression to calculate the budgeted amount for each employee.

During the budget calculation process, a record is created for each employee within the Employees list using the evaluated expression.

This step in “[Process of Setting Up Compensation Planning](#)” on page 68 includes a number of related tasks.

**Related Topics**

- [Creating a Compensation Budget and Budget Type on page 78](#)
- [Compensation Budget Expressions on page 79](#)
- [Calculating the Compensation Budget on page 80](#)
- [Locking the Compensation Budget on page 80](#)
- [Adding Employees to the Locked Compensation Budget on page 81](#)

## Creating a Compensation Budget and Budget Type

Budget records are created for employees who meet the following criteria:

- The employee record has an Employee Type designation of Employee.
- The employee has an employment status of Active, Leave of Absence, or Paid Leave of Absence  
Employee status is accessed using the Administration - Employee view.
- The employee meets each eligibility rule applied to the budgeting process.

***To create a budget***

- 1 Navigate to the Administration - Compensation Planning screen > Compensation Plan Rules Administration view.
- 2 From the visibility filters, select Budgets.
- 3 In the Budgets list, add a record, name the budget, and complete the remaining fields.

The following table describes some of the fields in the budget record.

Field	Comments
Period	Select the period that the budget covers. The Start and End fields are populated after you select a period.
Start	Start of the budget effective period.
End	Expiration date for the budget.
Organization	The organization associated with the budget.
Currency	The currency code for the budget.
Exchange Date	The currency exchange date used in the planning cycle. This date must be specified when multicurrency planning occurs.
Last Run	Indicates the date and time of the last budget calculation.

Field	Comments
Status	A system-generated value. Values are New, Calculated, and Locked. For more information, see <a href="#">“Locking the Compensation Budget” on page 80</a> .
Active	Select the check box to activate the budget.

**To create budget types for the budget**

- 1 Navigate to the Administration - Compensation Planning screen > Compensation Plan Rules Administration view.
- 2 From the visibility filters, select Budgets.
- 3 In the Budgets list, select the budget.
- 4 In the Budget Types list, add a record, and complete the fields.

The following table describes some of the fields.

Field	Comments
Budget	The total budget amount. This field is automatically completed when the budget is calculated. The application aggregates budget amounts for the employees associated with the selected budget type in the selected period.
Budget Spent	The total budget spent amount. The application aggregates budget spent amounts for the employees associated with the selected budget type in the selected period.
Eligibility Rule	An eligibility rule to indicate which employees have budgets created for them.
Expression	An expression used to calculate the budget amount.
Type	The compensation type for which you want to calculate a budget. Values include Merit, Promotion, Variable Pay, and Stock.

**Related Topic**

[Managing Compensation Budgets on page 77](#)

## Compensation Budget Expressions

You can create budget expressions that are used to calculate the budgets. A budget expression is a formula that can include any field within the Employee business component including Employee Salary, Employee Job Code, Employee Salary Grade, and so on.

Several standard functions are supported, allowing budget calculations to include arithmetic, Boolean, and conditional operators. For more information on syntax and functions that can be used in budget expressions, see *Siebel Tools Online Help, Using Siebel Tools, and Configuring Siebel Business Applications*.

**NOTE:** If you enter the employee salary in the Job Information section of the employee record using a currency different from the budget currency, Siebel Performance Management converts the employee salary to the budget currency during the calculation of the budget amount. The Employee Salary field must be the first field to appear within the expression for the currency conversion to be successful.

### Related Topic

[Managing Compensation Budgets on page 77](#)

## Calculating the Compensation Budget

After the budget definition (including the desired budget expressions) have been defined, you can begin the budget calculation.

**NOTE:** The budget calculation process should only be run in a server environment. Running the budget calculation process on a mobile or dedicated client is not recommended.

The budget calculation can take several minutes to complete depending on the number of employees and complexity of the budget expressions. During the calculation process, you can periodically press ALT + ENTER to refresh the screen and update the budget status.

### *To calculate the budget*

- 1 Navigate to the Administration - Compensation Planning screen > Compensation Plan Rules Administration view.
- 2 From the visibility filters, select Budgets.
- 3 In the budgets list, select the budget, and then click Calculate.
- 4 Verify that the budget calculation is completed by reviewing the status field in the budget record.  
When the calculation is completed, the budget status is Calculated.

### Related Topic

[Managing Compensation Budgets on page 77](#)

## Locking the Compensation Budget

After a budget is calculated, you can lock the budget record to prevent further calculations. Budget Types and Employee records can be manually updated as needed by temporarily unlocking the budget record.

Locked budgets can be linked to one or more planning cycles for incorporation into the associated compensation plans. After final approval of a compensation plan, the approved compensation change amounts for an employee are reflected in the Budget Spent fields in the Budget Types and Employees lists.

**CAUTION:** Running the budget calculation process results in the unrecoverable loss of the Budget and Budget Spent amounts for any previously calculated budget records. When necessary, individual Budget and Budget Spent amounts can be manually updated.

### *To lock a compensation budget*

- 1 Navigate to the Administration - Compensation Planning screen > Compensation Plan Rules Administration view.
- 2 From the visibility filters, choose Budgets.
- 3 In the Budgets list, query to find the budget.
- 4 In the Budget record, select Locked in the Status field.

**NOTE:** Budgets are unlocked by changing the status to Calculated.

### **Related Topic**

[Managing Compensation Budgets on page 77](#)

## **Adding Employees to the Locked Compensation Budget**

When you select a budget type, you also select an eligibility rule which is made up of eligible employees. Other employees who are not covered by the eligibility rule can be added to the compensation budget, after a budget is locked.

### *To add an employee to a locked budget*

- 1 Navigate to the Administration - Compensation Planning screen.
- 2 From the visibility filters, choose Budgets.
- 3 In the Budgets list, query for the budget, and in the budget record, change the value in the Status field to Unlocked.
- 4 In the Budget Types list, select the appropriate compensation type for the employee.
- 5 In the Employees list, add a new record and then from the Last Name field, select the employee.
- 6 Complete the remaining fields.

### **Related Topic**

[Managing Compensation Budgets on page 77](#)

## Defining Compensation Planning Cycles

You must create a planning cycle before initiating the compensation planning process. A planning cycle definition determines which period, budget, guidelines, eligibility rules, and compensation types are incorporated into a compensation planning cycle. After a planning cycle has been defined, the associated compensation plans can be created and released to the managers to begin the planning process.

This task is a step in [“Process of Setting Up Compensation Planning” on page 68](#).

### *To create a planning cycle*

- 1 Navigate to the Administration - Compensation Planning screen.
- 2 From the visibility filters, select Planning Cycles.
- 3 In the Planning Cycles list, add a planning cycle, provide a name and description, and complete the remaining fields.

The following table describes some of the fields.

Field	Comments
Organization	This field is automatically populated with the organization associated with the planning cycle based on the budget.
Budget	The budget record associated with the planning.
Exchange Date	The currency exchange date used in the planning cycle. This date must be specified when multicurrency planning occurs.
Period	The compensation plan period. This choice provides the values for the Plan Start and Plan End fields.
Plan Start	A read-only field that shows the start date of the compensation plan period, based on the period selection.
Plan End	A read-only field that shows the end date of the compensation plan period, based on the period selection.
Status	<p>This field displays the planning cycle status. The following values indicate status:</p> <ul style="list-style-type: none"> <li>■ New. The plan creation process has not been invoked.</li> <li>■ In Progress. The plan creation process is in progress.</li> <li>■ Done. The plans have been created, but they have not been released to managers for planning.</li> <li>■ Locked. The plans have been created and released to managers for planning.</li> </ul>

### Related Topic

[Associating a Compensation Component with a Planning Cycle on page 83](#)

## Associating a Compensation Component with a Planning Cycle

A planning cycle must have at least one compensation component associated with it. For each planning cycle, the list of associated components determines which component tabs (Merits, Promotions, Variable Pay, Stock, and so on) are accessible to managers during the planning process. The plan start and plan end dates are part of the planning cycle itself and apply to all components within it.

This task is a step in [“Process of Setting Up Compensation Planning” on page 68](#).

### Related Topic

[Defining Compensation Planning Cycles on page 82](#)

### *To associate a compensation component with a planning cycle*

- 1 Navigate to the Administration - Compensation Planning screen.
- 2 From the visibility filters, select Planning Cycles.
- 3 In the Planning Cycles list, select the planning cycle.
- 4 In the Components list, query for a component type.

The following table describes some of the compensation component fields.

Field	Comments
Type	The compensation type (for example, Merit, Promotion, Variable Pay, Stock).
Guidelines	The guideline associated with the compensation component.
Eligibility Rule	The eligibility rule associated with the compensation component.
Transaction Effective Date	The transaction effective dates of a merit, promotion, bonus, or stock grant transaction. Specifying one or more of these dates per compensation type provides control of dates from which managers can select when determining the effective dates of salary increases, promotions, bonus payouts, and stock grants.

# Generating and Releasing Compensation Plans

After you complete the planning cycle definition, Siebel Performance Management generates the actual compensation plans. The compensation plan generation process creates a plan for each manager participating in the planning process, according to the compensation plan rollout settings. For more information, see [“Defining the Compensation Plan Rollout” on page 76](#).

**NOTE:** The plan creation process should only be run in a server environment. Running the plan creation process on a mobile or dedicated client is not recommended.

After you complete the plan creation process, lock the planning cycle to release the generated compensation plans so that managers can begin planning. Do not lock planning cycles locked until after the cycles have been verified as ready for release.

This task is a step in [“Process of Setting Up Compensation Planning” on page 68](#).

## *To generate compensation plans*

- 1 Navigate to the Administration - Compensation Planning screen > Compensation Plan Rules Administration view.
- 2 From the visibility filters, select Planning Cycles.
- 3 In the Planning Cycles list, select the planning cycle, and then click Create Plans.
  - During compensation plan creation, a status of In Progress appears in the Status field. When the compensation plan creation process is completed, Done appears in the status field.
  - After the plans are created, they are accessible in the All Compensation Plans view. The plans must be released so that managers can begin the planning process.

**CAUTION:** Running the plan creation process for a planning cycle that is locked results in the unrecoverable loss of any previously planned compensation within that planning cycle.

## *To release compensation plans*

- 1 Navigate to the Administration - Compensation Planning Administration screen.
- 2 From the visibility filters, select Planning Cycles.
- 3 In the Planning Cycles list, query for the compensation plan.
- 4 In the compensation plan record, change the status to Locked in the Status field.

## Viewing All Compensation Plans

Administrators and managers participating in the rollout can view compensation plans using the All Compensation Plans and All Compensation Plans Across Organizations views. The All Compensation Plans view lists compensation plans associated with users in the organization. The All Compensation Plans Across Organizations view shows each compensation plan across all organizations. Compensation plans accessed through these views are editable and can be submitted, approved, and declined as needed.

This task is a step in [“Process of Setting Up Compensation Planning” on page 68](#).

### *To view compensation plan detail*

- 1 Navigate to the Administration - Compensation Planning screen > Employee Workbook Administration view.
- 2 From the visibility filters, select All Compensation Plans.
- 3 In the All Compensation Plans list, select the compensation plan, and then click the link in the Name field.

## Viewing Employee Compensation History

Administrators and managers can view the compensation plan history for each employee using the All Employees Compensation History view. This view is useful when assessing compensation planning results for a specific employee.

This task is a step in [“Process of Setting Up Compensation Planning” on page 68](#).

### *To view the compensation history for an employee*

- 1 Navigate to the Administration - Compensation Planning > Employee Workbook Administration view.
- 2 From the visibility filters, select All Employees Compensation History.
- 3 In the Employees list, query to find the employee whose history you want to view.
- 4 In the history list, query to locate compensation plan information.

## Navigating the Compensation Planning Screen (Managers)

From the Compensation Planning screen, managers can make compensation recommendations, review compensation plan submission status, the budget status, and plans for direct and indirect reports, as well as approve, decline and submit plans. Managers also can view compensation plan and budget details, check and adjust the direct report's fit with overall team ratings, and enter compensation details for each component using the view tabs.

### Navigation Bar Links

The navigation bar at the top of the screen provides links to employee compensation information. [Table 6](#) describes the links.

Table 6. Compensation Planning Screen Navigation Links

Navigation Link	Description
My Workbook List	Shows the My Compensation Plans list from which the user can query for additional plans and a form that provides details about the selected compensation plan.
Team Workbook List	Shows read-only budget information about the selected compensation plan (Budget view). From the Compensation Plans list the user can query for additional compensation plans and then approve, decline, or submit the selected compensation plan.
Team Summary List	Shows read-only compensation summary information for each of the compensation plan owner's direct reports. Details include eligibility, the job code, annual rating, current salary, merit percentage, and compa ratio for each selected employee.
Support Team Workbook List	Lists members of the support team associated with the manager's team of direct reports. Details include the support team member's position, responsibility, and the employee type.
Support Team Summary List	Shows compensation details for each member of the support team, including compensation eligibility, salary information, compa ration, and so on.

## Compensation Components Views

The Compensation Plans list consist of the compensation plans owned by the manager. By selecting a compensation plan and then clicking on an associated view tab, the manager can view and modify performance and compensation information for each direct report. [Table 7](#) describes the views.

Table 7. Compensation Planning and Performance Ratings Views

View Tab	Description
Performance	Provides ratings distribution information for the compensation plan owner, and for each of the plan owner's direct reports. For more information on adjusting ratings, see <a href="#">Chapter 4, "Working with Ratings Distributions."</a>
Budget	Provides read-only information such as the total budget, the planned compensation, and the remaining budget for each compensation plan component (Merit, Promotion, Variable Pay, and Stock).
Merit	<p>Allows base pay increases based on a combination of sustained high performance in the current position, current position in assigned salary range, competitiveness of the organization's compensation plans, and company financial performance.</p> <p>The Merit list provides a list of employees eligible for merit compensation. Detailed compensation information associated with the selected employee appears in a subview form. By drilling down on the Last Name link for the direct report, the manager can view the report's compensation history. By drilling down on the Rating link, the manager can see a review summary, view the direct report's objectives, and delegate the review to the to the next-level manager.</p>
Promotion	<p>Used to reclassify an employee to a job that requires a higher level of skill, competency and responsibility. A promotion must be accompanied by increased job scope, impact, and management responsibility or span of control.</p> <p>Employees are typically promoted to the next level in their career path. A promotion may or may not be accompanied by change in compensation. If compensation is warranted, the amount should place the employee at the minimum of the new salary range, and the amount should not exceed the maximum of the new range.</p>
Variable Pay	Short term, discretionary bonus payment. This compensation may reflect the organization's overall performance and takes into account an employee's annual performance contribution.
Stock	Provides the employee with an opportunity for long-term equity in the organizations and is awarded to recognize performance and future leadership potential.

Table 7. Compensation Planning and Performance Ratings Views

View Tab	Description
Recommendations Status	Lists all compensation plans owned by the manager and the status of the submitted plan.
Justification	Provides a text field for supporting comments to justify compensation or promotion.

## Selecting the Compensation Plan for Rollout

The manager participating in the compensation plan rollout begins the process by selecting the compensation plan from a Compensation Plans list of owned plans. The manager can select a customized plan from the My Workbook List view or a group-based plan from the Team Workbook List view and see compensation summary information for members of the manager’s team in the Team Summary List view.

This task is a step in [“Process of Setting Up Compensation Planning” on page 68](#).

### *To select the compensation plan*

- 1 Navigate to the Compensation Planning screen.
- 2 In the Compensation Plans view, click the link My Workbook List.  
The Team Workbook List appears as the default.
- 3 In the Compensation Plans list, query for the compensation plan.
- 4 In the More Info form, review the compensation plan information.

## Defining Compensation Changes for Direct Reports

If a budget is associated with a compensation plan, and guidelines are established for the compensation component, compensation amounts for eligible employees are automatically populated according to the performance rating.

Managers can make discretionary adjustments to the compensation amounts, and then use the compensation tool to make sure the adjustments meet the established guidelines for the ratings category.

The manager involved with a compensation plan rollout defines compensation changes for each employee, specifying which direct reports receive merit, promotion, variable pay, and stock compensation. For each compensation-specific view, the Roll Up and Roll Down buttons allow the manager to roll up all compensation plans, or roll them down, according to a previously established hierarchy.

This topic is a step in “[Process of Setting Up Compensation Planning](#)” on page 68.

**Related Topics**

- [Compensation Guidelines Indicator on page 89](#)
- [Tracking Compensation Plan Recommendations Status on page 91](#)

***To define compensation changes for direct reports***

- 1 Navigate to the Compensation Planning screen.
- 2 In the Compensation Plans view, click the link Team Workbook List.
- 3 In the Compensation Plans list, select the compensation plan.
- 4 Click the appropriate view tab for the type of compensation the employee is receiving. Options are Merit, Variable Pay, Promotion, and Stock.
- 5 In the appropriate list, query for the employee.
- 6 For each employee, modify the values in the appropriate fields.

The following table describes some of the fields for each view.

View	Fields
Merit	Enter amounts in either the Change % or the Change Amount fields.
Promotion	Specify a new job code, and then enter values in either the Change % or the Change Amount fields.
Variable Pay	Specify the % of Target award to award for the bonus.
Stock	Specify the number of shares awarded for the stock grant.

**Compensation Guidelines Indicator**

When you adjust a compensation component value, Siebel Performance Management compares the proposed compensation against the guidelines, and if the amount is above or below the recommended amount, an indicator appears in the Guidelines field. The Compa Ratio is also calculated.

Figure 8 shows the Guidelines field for a group of eligible employees within the merit compensation component. In records where compensation exceeds the guidelines, a plus sign appears. If the compensation is below the amount recommended in the guideline, a minus sign appears. If the compensation is within the recommended range, the field appears blank.

New Salary	New Compa Ratio	Guidelines	Roll Status	Manager
\$65,000.00	1.18			HHUNT
\$47,000.00	0.93			PMOORE
\$64,000.00	1.16	In guideline range		MMARKS
\$69,360.00	1.10	⊖		MMARKS
\$75,472.80	1.19		↕	JRUBIN
\$69,666.00	1.10			HHUNT
\$74,550.00	1.18	⊖	↕	JRUBIN
\$70,000.00	1.11		↕	JRUBIN
\$60,320.00	0.95	⊖	↩	JRUBIN
\$45,500.00	0.82			PMOORE
640,868.80				

Figure 8. Guidelines Indicator and New Compa Ratio Fields

For example, if guidelines stipulate that for the individual, the merit increase should be between 4% and 8%, and the increase that is entered is 3.5, the guideline indicator (a minus sign) alerts the manager that the proposed merit increase is below the recommended target range for a rating of 1.1, and a compa ratio of 1. If the planned increase is 15%, the system signals that the proposed amount is outside the range of the amount established for the individual's peers.

Individuals that are significantly underpaid typically have a compa ratio of less than 1. If you sort employees that have the same job role by salary, the mid-range employee typically will have a compa ratio of 1. Having a compa ratio below 1 may also mean that the individual was just promoted to the job role.

## Adding Justification Comments to the Compensation Plan

Managers can add comments about the Compensation Plan and participants using the Justification view. The comments are visible to any individual accessing the compensation plan.

This task is a step in [“Process of Setting Up Compensation Planning”](#) on page 68.

### Related Topic

[Defining Compensation Changes for Direct Reports](#) on page 88

### *To add justification comments to the compensation plan*

- 1 Navigate to the Compensation Planning screen.

- 2 In the Compensation Plans view, click the link Team Workbook List.
- 3 In the Compensation Plans list, select the compensation plan.
- 4 Click the Justification view tab, and add comments in the text field.

## Tracking Compensation Plan Recommendations Status

Managers can see the status of compensation plan recommendations in the Recommendations Status view, which is automatically updated as compensation plans are reviewed and submitted or rejected. Each time the compensation plan status changes, Recommendations Status is updated with a new record.

This task is a step in [“Process of Setting Up Compensation Planning” on page 68](#).

### *To review the status of a compensation plan*

- 1 Navigate to the Compensation Planning screen.
- 2 In the Compensation Plans view, click the link Team Workbook.
- 3 In the Compensation Plans list, select the compensation plan.
- 4 Click the Recommendations Status view tab.

### **Related Topic**

[Defining Compensation Changes for Direct Reports on page 88](#)

## Submitting a Compensation Plan for Approval

After compensation changes are completed, the manager submits the compensation plan to the designated approver.

This task is a step in [“Process of Setting Up Compensation Planning” on page 68](#).

### *To submit a compensation plan for approval*

- 1 Navigate to the Compensation Planning screen.
- 2 In the Compensation Plans view, click the link Team Workbook List.
- 3 In the Compensation Plans list, select the compensation plan.
- 4 Click Submit.

## Approving and Rejecting a Compensation Plan

The designated approver reviews and either approves or rejects submitted compensation plans. If the compensation plan is approved, then it is automatically submitted for Final Approval.

This task is a step in [“Process of Setting Up Compensation Planning” on page 68](#).

### *To approve and reject compensation plans*

- 1 Navigate to the Compensation Planning screen.
- 2 In the Compensation Plans view, click the link Team Workbook List.
- 3 In the Compensation Plans list, select the compensation plan, and then click the appropriate action button.
  - Click Approve to approve the selected compensation plan. Approved compensation plans are no longer editable.
  - Click Decline to decline approval for the compensation plan. Declined compensation plans are editable by the manager who submitted the plan.

## Assigning Compensation Support Team Members to Employees

In cases when managers cannot perform compensation plan actions, and employees request compensation advice, Human Resources can assign support team members to assist employees. For example, Human Resources can assign a manager-level support team member to a manager who needs administrative support while vacationing or to a manager who needs to delegate some compensation tasks.

If an employee has a compensation question, the HR-assigned employee-level support member can view the employee's compensation information and make recommendations.

### **Manager-Level Support Member**

This support team member performs in a proxy capacity, completing necessary tasks such as modifying, submitting, and rejecting compensation plans on the behalf of the manager they are supporting. However, the manager-level support member cannot access the individual employee's compensation details.

### **Employee-Level Support Member**

This support team member can view specific compensation details for the employee to whom they are assigned. The employee-level support member cannot modify employee-level data.

These tasks are a step in [“Process of Setting Up Compensation Planning” on page 68](#).

### *To assign support for an employee*

- 1 Navigate to the Administration - User screen > Employees > Support Team view.
- 2 In the Employees list, select the employee.
- 3 In the Support Team list, add a support team member.
- 4 In the new record, select the Support Rule, and complete the remaining fields.  
Support Rules are either Employee-Level Support or Manager-Level Support.

### *To assign employees to an employee-level support person*

- 1 Navigate to the Administration - User screen > Employees > Employee Level Support view.
- 2 In the Employees list, select the support person (employee) to whom employees are to be assigned.
- 3 In the Employee Level Support list add the employee and complete the fields.  
You can add more than one person for employee level support.

### *To assign employees to a manager-level support person*

- 1 Navigate to the Administration - User screen > Employees > Manager Level Support view.
- 2 In the Employees list, select the support person.
- 3 In the Manager Level Support list, add an employee.  
You can add more than one employee for manager-level support.

### *To assign employees to existing support people (HR task)*

- 1 Navigate to the Administration - User screen > Support Team List view.  
Using the Visibility filters list, you can list the Support Team - Employee Level or Support Team - Manager Level individuals. To be listed, at least one employee must be assigned as a Support Team member.
- 2 In the Support Team list, select the support person to whom employees are to be assigned.
- 3 In the Supported Employees list, add one or more employees.  
Selected employees are supported by the selected support team member in either a manager-level or an employee-level capacity.

## Exchange Rates for Compensation Planning

When you plan compensation that uses multiple currencies, you must define the associated currency accurately maintained them within the Siebel application.

The exchange rates from one currency to another must be defined with reciprocity within currency administration. For example, the exchange rate between U.S. Dollars to Japanese Yen and Japanese Yen to U.S. Dollars must both be defined.

### Related Topics

[Process of Setting Up Compensation Planning on page 68](#)

# 7

## Setting Up and Administering Performance Scorecard

The Performance Scorecard application is an add-on module to the Siebel Objectives and Reviews application. Before setting up and using Performance Scorecard, you should understand the setup and administration of Objectives and Reviews.

This chapter describes installation, administration, configuration and end-user procedures for Performance Scorecard. It includes the following topics:

- [Process of Setting Up Performance Scorecard on page 96](#)
- [Enabling Component Groups for Performance Scorecard on page 96](#)
- [Setting the File System Parameter During Analytics Server Setup on page 97](#)
- [Preserving Analytics Web Catalogs on page 98](#)
- [Activating Workflows to Request Scorecard KPI Values on page 98](#)
- [Configuring Web Services for KPI Analytics Load on page 99](#)
- [Setting Up Symbolic URL for KPI Views on page 100](#)
- [Configuring Server Parameters for ERAdmin Object Manager on page 100](#)
- [Scheduling a Repeating Server Job for KPIs on page 101](#)
- [Configuring the Performance Scorecard Dashboard on page 102](#)
- [Configuring the Root Path for KPIs in Siebel Analytics Data Load Catalog on page 104](#)
- [KPIs and Scorecard Administration on page 105](#)
- [Performance Scorecard Components on page 105](#)
- [Performance Scorecard Administration Concepts on page 107](#)
- [Working with the KPI Administration Screen on page 111](#)
- [Process of Administering and Using KPIs and Performance Scorecard on page 114](#)
- [Specifying a Different Analytics Server for KPI Value Calculation on page 114](#)
- [Creating List Subject Areas and Setting Responsibilities for Analytics KPIs on page 116](#)
- [Creating a KPI Request in Siebel Analytics on page 117](#)
- [Defining Key Performance Indicators, Update Methods and Access Groups on page 122](#)
- [Working with Objectives, KPIs and Scorecard \(End User\) on page 125](#)

## Process of Setting Up Performance Scorecard

This process represents the installation tasks that are performed during setup of the Performance Scorecard module. Your company may follow a different process according to its business requirements.

Complete these procedures after installing the Analytics and Siebel Servers and completing set up tasks for Siebel Objectives and Review. For more information, see [“Setting Up Objectives and Reviews” on page 17](#). You only need to perform these steps one time.

- 1 [Enabling Component Groups for Performance Scorecard on page 96](#)
- 2 [Setting the File System Parameter During Analytics Server Setup on page 97](#)
- 3 [Preserving Analytics Web Catalogs on page 98](#)
- 4 [Activating Workflows to Request Scorecard KPI Values on page 98](#)
- 5 [Configuring Web Services for KPI Analytics Load on page 99](#)
- 6 [Setting Up Symbolic URL for KPI Views on page 100](#)
- 7 [Configuring Server Parameters for ERAdmin Object Manager on page 100](#)
- 8 [Scheduling a Repeating Server Job for KPIs on page 101](#)
- 9 [Configuring the Performance Scorecard Dashboard on page 102](#)
- 10 [Configuring the Root Path for KPIs in Siebel Analytics Data Load Catalog on page 104](#)

## Enabling Component Groups for Performance Scorecard

Enable the following component groups to configure the workflow policy:

- **Workflow Manager Component Group.** Enable the Workflow Management component group to make sure that the necessary workflows for the application run correctly.
- **Enterprise Application Integration (EAI) component group.** Enabling the Enterprise Application Integration (EAI) component group activates the integration processes that are required for the application to run correctly. For more information on EAI, see *Overview: Siebel Enterprise Application Integration* and *Integration Platform Technologies: Siebel Enterprise Application Integration*.

**NOTE:** After enabling the component groups, log out of the Siebel application, and restart the Siebel Server.

This task is a step in [“Process of Setting Up Performance Scorecard” on page 96](#).

### *To enable the workflow manager component group*

- 1 Navigate to the Administration - Server Configuration screen > Enterprises > Component Groups view.

- 2 Query in Component Group for Workflow\*.  
The Workflow Management Component Group appears.
- 3 If the component group's state is not enabled, click Enable.

#### **To enable the EAI manager component**

- 1 Navigate to the Administration - Server Configuration screen > Enterprises > Component Groups view.
- 2 In the Component Groups list, query for EAI\*.  
The component group Enterprise Application Integration appears.
- 3 Click Enable.

## Setting the File System Parameter During Analytics Server Setup

Setting the MarketingFileSystem parameter allows the Siebel Analytics Server to communicate with the Siebel Server for an exchange of data on Key Performance Indicators (KPIs).

This task is a step in ["Process of Setting Up Performance Scorecard" on page 96](#).

#### **To set the file system parameter**

- 1 Complete the procedures in the Marketing Analytics post-installation instructions.  
For more information, see *Siebel Analytics Installation and Configuration Guide*.
- 2 Set the MarketingFileSystem parameter in the instanceconfig.xml file.

The instanceconfig.xml file can be found at the following location:

```
<AnalyticsServerName1>\SiebelAnalyticsData\Web\config\instanceconfig.xml
```

For more information on working with the instanceconfig.xml file, see *Siebel Analytics Web Administration Guide*.

Add the following line:

```
<MarketingFileSystem>FileSystemLocation/<MarketingFileSystem>
```

where FileSystemLocation is a shared location, and the subdirectory FileSystemLocation/Marketing/EAI exists.

For example, if your file system is located on your C: drive in the sea78 folder, the line would be similar to the following:

```
<MarketingFileSystem>c:\sea78\fs\</MarketingFileSystem>
```

The instanceconfig.xml file can be found at the following location:

```
\SiebelAnalyticsData\Web\config\instanceconfig.xml
```

FileSystemLocation/Marketing/EAI is where Analytics locates the KPI Analytics output files. A Siebel server parameter must be configured to point to the same FileSystemLocation so that the KPI Analytics data loader can find the files and import them into the Siebel database using EAI. See [“Configuring Server Parameters for ERMAAdmin Object Manager” on page 100](#) for information on how to configure the parameter.

## Preserving Analytics Web Catalogs

Complete the steps in the following procedure if your organization has an existing Analytics server with a Web catalog and your organization wants to preserve the Web catalog for use with other servers. Omit this procedure if it does not apply to your organization’s implementation.

For example, you may wish to preserve the Web catalogs (for example, KPI Analytics requests) for use with different Analytics Web installations so that you do not need to recreate the Web catalogs each time they are required. Using the procedure, you can save a previously created Web catalog and then move it from AnalyticsWebServerName1 to AnalyticsWebServerName2.

For more information about backing up and maintaining the Web catalog, see *Siebel Analytics Web Administration Guide*.

This task is a step in [“Process of Setting Up Performance Scorecard” on page 96](#).

### *To preserve a Web catalogs for use with other Analytics servers*

- 1** Save the most recent .autosave file, located in the following directory:  
    \SiebelAnalyticsData\Web\Catalog  
  
    For example, save Siebel Analytics.webcat.16.autosave from  
    \\<AnalyticsWebServerName1>\SiebelAnalyticsData\Web\Catalog.
- 2** In the \\<AnalyticsWebServerName2>\SiebelAnalyticsData\Web\Catalog directory, perform the following steps:
  - a** Back up the existing Siebel Analytics.webcat file.
  - b** Paste a copy of the autosave file saved in [Step 1](#), and rename it Siebel Analytics.webcat.
  - c** Remove the Siebel Analytics.webcat.version file.
- 3** Restart the Siebel Analytics Web Server.

## Activating Workflows to Request Scorecard KPI Values

Complete the steps in the following procedure to activate the workflows that allow Siebel Object Manager and Siebel Analytics to communicate at predefined intervals determined by the administrator.

Activating the workflows allows the scorecard to request KPI values from Siebel Analytics. These workflows are part of the Analytics Data Load process. You only need to activate these workflows once for a database. For more information on working with workflows, see *Siebel Business Process Designer Administration Guide*.

This task is a step in [“Process of Setting Up Performance Scorecard” on page 96](#).

### **To activate KPI workflows**

- 1 Navigate to the Administration - Business Process screen > Workflow Deployment view.
- 2 In the Active Workflow Processes list, query for Name = \*KPI\*.

The following workflows should appear:

- ERM Active KPI Refresh-Synch-Track
- ERM All Active KPIs Refresh-Synch-Track
- Import KPIs

If you do not see the workflows, proceed to [Step 3](#) to activate them. If the workflows appear with a value of Active in the deployment Status column, then they are already active. Omit [Step 3](#) and [Step 4](#).

- 3 In the Repository Workflow Processes list, query for Name = \*KPI\*.

The three workflows appear.

- 4 Select each workflow, and click Activate.

## **Configuring Web Services for KPI Analytics Load**

Complete the steps in the following procedure to enable Siebel Server communication with the correct Siebel Analytics Server for KPI Analytics load.

This task is a step in [“Process of Setting Up Performance Scorecard” on page 96](#).

### **To configure Web services for KPI Analytics Load**

- 1 Navigate to the Administration - Web Services screen > Outbound Web Services view.
- 2 In the Outbound Web Services list, query for Name = \*Service\*.

The query should return at least the following three records:

- JobManagementService
- SAWSessionService
- WebCatalogService

- 3 Perform the following steps for each of the three Web services:

- a Verify that the Service Ports list includes a record with Name = \*KPI\*.  
For example, the name might be JobManagementServiceSoapKPI.
  - b For the Web services with KPI in the name, replace CHANGEME in the Address field with the address of the appropriate Analytics server.  
For example, the value in the Address field might be `http://CHANGEME/analytics/saw.dll?SoapImpl=jobManagementService`, and the Serviceaddress might be `smt4500i023`.  
Using this example, the Address field for JobManagementServiceSoapKPI would be `http://smt4500i023/analytics/saw.dll?SoapImpl=jobManagementService`.
- 4 Navigate to the Administration - Key Performance Indicators screen > Analytics Web Server view.
  - 5 In the Servers list, query for Name = <Default KPI Analytics Server > and make sure that the User ID and Password fields are populated with the correct login for the Analytics server.

## Setting Up Symbolic URL for KPI Views

Complete the steps in the following procedure to expose the Siebel Analytics views in the KPI views. For more information on setting up Symbolic URLs, see *Applications Administration Guide*.

This task is a step in [“Process of Setting Up Performance Scorecard” on page 96](#).

### *To set up Symbolic URL for KPI views*

- 1 Navigate to the Administration - Integration screen > WI Symbolic URL List view.
- 2 From the visibility filters, choose Host Administration.
- 3 Query for Virtual Name = NQHOST, and then change the value in the Name field to the Analytics ServerName.

For example, change the name to `smt4500i023`.

## Configuring Server Parameters for ERAdmin Object Manager

Complete the steps in the following procedure to make sure that the ERAdmin Object Manager is referencing the correct Analytics Web Server parameters. Set the parameters, if necessary.

This task is a step in [“Process of Setting Up Performance Scorecard” on page 96](#).

### *To determine the Analytics Web server parameters*

- 1 Navigate to the installation of the Analytics Web server.  
For example, if the Analytics Web is installed on `smt4500i023`, navigate to `\\smt4500i023\SiebelAnalyticsData`.

- 2 Locate the Config directory (For example, <<\\smt4500i023\SiebelAnalyticsData\Web\config>>) and review the contents of the instanceconfig.xml file.

The file system value is specified between the <MarketingFileSystem> tags. For example, <MarketingFileSystem>\\smt4500i023\sea18101\fs\</MarketingFileSystem>

**To configure server parameters for Object Manager**

- 1 Navigate to the Administration - Server Configuration screen > Servers view.
- 2 In the Siebel Servers list, select the Siebel server.
- 3 Select the Parameters tab in the middle list, query for the parameter Marketing File System, and then set the Value On Restart and default Value fields to the same values as set for the Analytics Web server.

For example, set the field values to \\smt4500i023\sea18101\fs.

- 4 In the middle list applet, click on the Parameters tab, and query for the parameter Default Analytics Web Server.
- 5 Set Value On Restart and the default Value fields to the Default KPI Analytics Server.
- 6 Restart the Siebel server.

## Scheduling a Repeating Server Job for KPIs

Complete the steps in the following procedure to enables the server to perform daily check on the KPIs for automatic refresh, synchronization, and track. This server task invokes a workflow which examines each KPI to determine if it needs to be refreshed, synchronized or tracked and if so, performs the updates.

This task is a step in [“Process of Setting Up Performance Scorecard” on page 96.](#)

**To schedule a repeating server job for KPIs**

- 1 Navigate to the Administration - Server Management screen > Jobs view.
- 2 Create a new Job and complete the fields.

The following table describes the values for the fields.

Field	Value
Component/Job	Workflow Process Manager
Requested Server	Server name, for example, rfu03
Repeating?	Y
Repeat Units	Days

Field	Value
Repeat Interval	1
Scheduled Start	Time to start this repeating task, for example, 5/11/2004 01:00:00 AM
Repeat From	Scheduled Start

- 3 In the Job Parameters list, create a record, and complete the fields using the values in the following table.

Field	Value
Name	Workflow Process Name
Value	ERM All Active KPIs Refresh-Synch-Track

- 4 Click Start to activate the job.

## Configuring the Performance Scorecard Dashboard

The Performance Scorecard view holds the Siebel Analytics Performance Scorecard dashboard. Before the dashboard can be used, you must confirm that the integration between the Performance Scorecard dashboard and the Siebel application is occurring properly.

**NOTE:** Siebel Analytics application versions prior to Siebel Analytics 7.8 do not include the Performance Scorecard dashboard.

In addition, if you plan to use the Performance Scorecard Parent-Child Objectives feature, you must configure this feature within the Performance Scorecard application.

The Parent-Child Objectives feature allows end users to link objectives so that there is a line-of-sight view of who is working on which objectives in the organization. Each user can select an objective from the current period as a parent objective, establishing a connection with an entire chain of objectives.

This chain of objectives activates the drill path functionality that occurs in the Analytics Scorecard view within the Performance Scorecard dashboard. If the chain of objectives is not established, automatic drill-path functionality is not available, although a method can be employed by using Siebel Answers functionality.

This task is a step in ["Process of Setting Up Performance Scorecard" on page 96](#).

### Configuring Parent-Child Objectives

Complete the steps in the following procedure to configure parent-child objectives so that drill-down functionality is enabled in Performance Scorecard. For more information about using Siebel Tools, see *Using Siebel Tools*.

### *To turn on Parent-Child Objective functionality*

- 1 Launch Siebel Tools, and in the Object Explorer, click the Flat tab.
- 2 In the Siebel Objects list, select Applet Web Template Item, and then query for Name=Parent Objective.  
Thirty inactivated records should appear.
- 3 Activate each record by setting the value Inactive to FALSE.
- 4 Compile projects ERM Performance Management and ERM Performance Management Admin onto siebel.srf.

## **Verifying Performance Scorecard Integration**

It is not required that you use Siebel Analytics to show the Performance Scorecard. However, if you are displaying the Scorecard using Siebel Analytics, you must make sure the Performance Scorecard Symbolic URL is set up correctly.

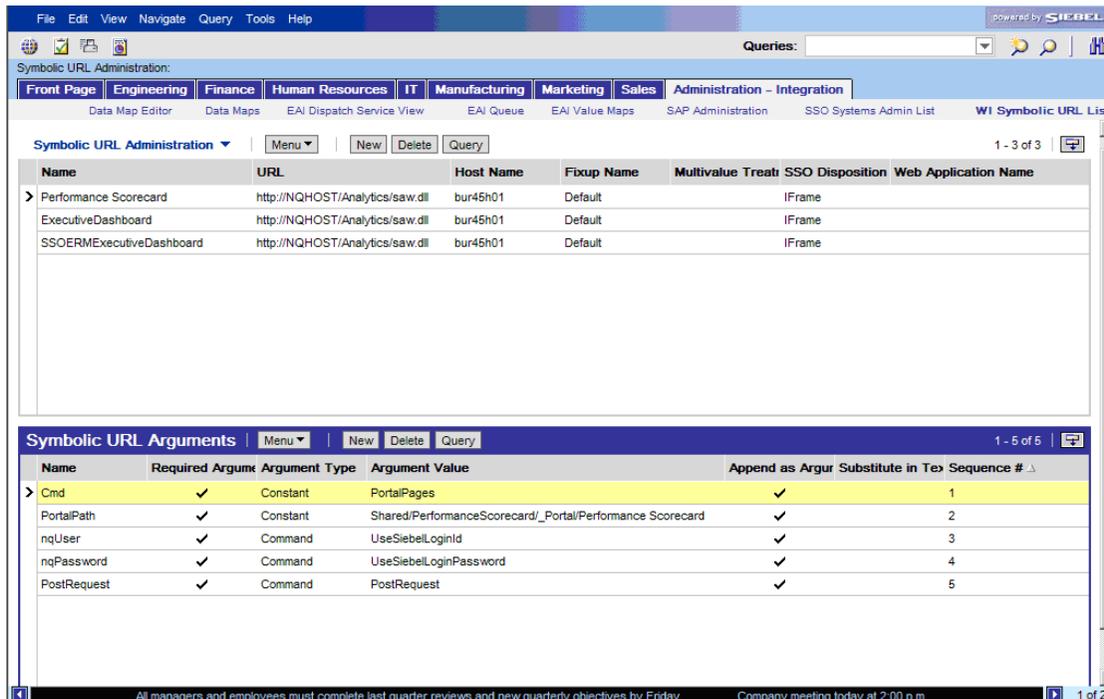
Complete the steps in the following procedures to verify integration of the Performance Scorecard dashboard and your Siebel application.

### *To verify Performance Scorecard integration*

- 1 Navigate to the Administration - Integration screen > WI Symbolic URL List view.
- 2 From the visibility filters, select Symbolic URL Administration.

- 3 In the Symbolic URL Administration list, query for Performance Scorecard.

The Performance Scorecard Symbolic URL and the associated Arguments should appear, as shown in the following example figure.



## Configuring the Root Path for KPIs in Siebel Analytics Data Load Catalog

As an administrator, you can change the default catalog path in the Siebel Analytics Data Load Catalog. The path is used when you pick a KPI Request from the KPI Administration screen.

This task is a step in [“Process of Setting Up Performance Scorecard”](#) on page 96.

### *To change the default Siebel Analytics Data Load Catalog path*

- 1 Launch Siebel Tools.
- 2 From the Siebel Objects list, select Business Components.
- 3 Query for the Business Component called ERM KPI Analytics Report VBC.

- 4 Find the User Properties for the business component, and edit the properties Initial Path 1 and Initial Path 2 as follows:

Initial Path 1 = /shared/ERM

Initial Path 2 = /users/[LOGIN]

You can also add another user property. The edited user properties become the default catalog paths.

## KPIs and Scorecard Administration

Using the Performance Scorecard application, an organization can periodically track the metrics for Key Performance Indicators (KPIs) and objectives to assess how well performance goals are being met.

In a typical organization, the executives and manager set objectives and then roll down the tactical portions of these objectives to individual employees. Each individual employee creates his or her own objectives (or receives prebuilt objectives) and associates the objectives with a Key Performance Indicator (KPI). The employee sets Targets (goals) for the KPI for a specific time period. The application combines the complete set of objectives and KPIs and creates a view of overall performance called the Scorecard. Executives and managers can view each employee's scorecard to determine how the individual, or a segment of the organization, is performing.

Because the Performance Scorecard application is an add-on module to the Siebel Objectives and Reviews application, administrators must understand, set up, and be able to administer the Objectives and Reviews application before administering and using Performance Scorecard.

Before beginning Performance Scorecard administration, review the concepts in the following topics:

- [Performance Scorecard Components on page 105](#)
- [Performance Scorecard Administration Concepts on page 107](#)

## Performance Scorecard Components

There are three major components in the Performance Scorecard application. These components are Objectives, KPIs, and Scorecards.

### Objectives

Employees typically set objectives at the beginning of a quarter or the year that define their goals for the specified time period. At the end of the established time period, the employee's performance is measured against the objectives and is evaluated by the employee's manager. Objectives are administered using the Objectives and Reviews application. For more information, see [Chapter 3, "Setting Up Objectives and Reviews."](#)

## Key Performance Indicators (KPIs)

A KPI is a metric that is associated with an objective to provide a quantitative method of measuring performance. For example, an employee might have an objective to increase customer satisfaction. A KPI that might be used for this objective is the customer satisfaction rating. An employee selects a KPI (or multiple KPIs) to associate with an objective, and then the employee provides a target (or goal) for that KPI. At the end of the period the employee is evaluated on whether or not the employee achieved the target for that KPI.

During the period employees can monitor their performance by reviewing the value of the KPI that determines how close they are from the target goal. For example, an employee who selects customer satisfaction rating as the KPI may choose 95% as the target value. The current value may be 88%. As the period progresses, the employee can see if the KPI is changing, and the employee's performance is tied to how well the employee can influence that KPI. In the Scorecard application there are two types of KPIs:

- **Global KPI.** This KPI has the same value regardless of which employee picks the KPI. For example, a Global KPI might be Company Revenue. The value of the KPI is always the same for a specific time period.
- **Employee-Specific KPI.** This KPI has a different value for each employee. For example, an Employee-Specific KPI might be Typing Speed. Each individual employee may type at different speeds. When one employee picks this KPI, the value may be 40 words a minute. Another employee may pick the same KPI, but the value may be 100 words a minute. These employees would typically set different targets for the individual KPIs.

### KPI Attributes

A KPI has multiple attributes, including type, value, update method, category, source, and so on. As an administrator, you define these attributes when you define a KPI.

The most important attribute of a KPI is the KPI Value. The value of the KPI can be populated using three methods. These methods represent the List of Values for the column, Update Method.

- **Siebel Analytics Method.** The Siebel Analytics server retrieves the KPI value and populates the value by means of the Siebel Analytics Data Loader's Refresh process.
- **Manual Method.** A KPI Administrator manually enters the value of the KPI into the KPI Administration screen.
- **Alternative Method.** A developer or a Siebel configuration specialist sets up a business service or workflow to pull the value from another data source and populate the Siebel business component (data model). The configurator can use one of many available integration methods such as Siebel EAI, EIM, and so on.

### KPI Definitions

A KPI Definition is created by an administrator. The administrator decides which Update Method the KPI uses. If the Update Method is Siebel Analytics, then the administrator needs to create a KPI Request. A *KPI Request* is the Siebel Analytics predefined query for that KPI. For more information on KPI Requests and KPI Definitions, see ["Defining Key Performance Indicators, Update Methods and Access Groups"](#) on page 122 and ["Creating a KPI Request in Siebel Analytics"](#) on page 117.

## Scorecards

After the employee creates individual objectives and selects the KPIs that are associated with the objectives, the employee has a complete Scorecard. The Scorecard is simply a view that combines the Objectives, KPIs, Targets, and KPI Values in one location to provide an overall view of performance.

## Performance Scorecard Administration Concepts

To administer the Performance Scorecard application, you must first understand some key administration concepts and how these concepts apply to Performance Scorecard. These concepts include:

- [Scorecard Responsibilities and Access Groups on page 107](#)
- [Employee Objective KPIs and Database Records on page 109](#)
- [KPI Effective End Date and Effective Start Date on page 109](#)
- [KPI Update Frequency on page 109](#)
- [Tracking Frequency and KPI Values on page 110](#)

### Scorecard Responsibilities and Access Groups

When an employee clicks the KPI selection tool on the Objectives screen, the employee sees a list of available KPIs. This list of KPIs is controlled by two methods, Access Group and Active KPIs.

If the KPI is associated with an access group, on an employee who is included in the access group can see the KPI, and the KPI must be marked as Active for the employee to see the KPI in the KPI list. The access group method makes sure sensitive KPI data such as salary information cannot be accessed by nonmanagerial employees.

The Performance Scorecard application has five end-user views. These views are associated with either the ERM User or the ERM Manager responsibility. If the organization has licensed the Performance Scorecard application, users with ERM User or ERM Manager responsibility can see the appropriate end-user views. There are also three views for use by the administrator. Users with the KPI Administrator or SADMIN responsibilities also see these views.

Table 8 summarizes responsibilities and view visibility for the Performance Scorecard application.

Table 8. Responsibilities and Available Views for Performance Scorecard

View	Responsibility	Description
My KPIs	ERM User	Shows all KPIs for the current period and previous periods for the user that is logged in. Shows the attributes for the KPIs and allows users to edit the target and other attributes of the KPIs in the current period.
My Team's KPIs	ERM Manager	Shows all KPIs for the current period and previous periods for the users that report to the person who has logged in. Shows the attributes for the KPIs and allows managers to edit the target or other attributes of the KPIs in the current period. This is the standard Siebel view of My Team, which shows all employees reporting to the manager in the positions hierarchy.
Objective Scorecard	ERM User	A read-only view that displays a printable version of the KPIs, objectives, and performance to the target for the current objectives period. The logged-in user can see the scorecard of any user in the organization whose position is below this or her own in the positions hierarchy.
Review Scorecard	ERM User	A read-only view that displays a printable version of the KPIs and objectives and performance to the target for the current review period. The logged-in user can see the scorecard of any user in the organization whose position is below this or her own position in the positions hierarchy.
Performance Scorecard	ERM User	A read-only view that displays an interactive view of KPIs and objective performance. The organization must be using Siebel Analytics dashboards for this view to be visible. The view shows a trend analysis of KPIs, current objectives, and review KPIs. The view only shows the scorecard for the logged-in user.
KPI Administration	KPI Admin SADMIN	The administrator uses this view to define, edit, and update KPIs, attributes, and security.

Table 8. Responsibilities and Available Views for Performance Scorecard

View	Responsibility	Description
Analytics Web Server Administration	KPI Admin SADMIN	The administrator uses this view to administer the Siebel Analytics Server for the KPI connection.
KPI Analytics Request Administration	KPI Admin SADMIN	The administrator uses this view to create the KPI Request using Siebel Analytics.

## Employee Objective KPIs and Database Records

Each time an employee chooses a KPI and associates the KPI with an objective, a record is created. This record is stored perpetually in the database. Each record contains important information such as the KPI Name, Objective Name, Employee Name, Manager, KPI Value, KPI Start Date, and KPI End Date.

Although the KPI Value can change throughout the period for which the objective is chosen, the KPI Value is frozen for the specific employee's objective after the period ends. The user can then review performance in previous periods and understand how well the employee achieved his or her target for a specific period and KPI.

The date that determines the final KPI Value for the record can be set in two ways. Employees can choose Employee KPI End Dates when they pick the KPI. If the KPI End Date is not set by the employee, it defaults to the Period End Date.

Siebel Performance Management saves and lists all Employee Objective KPI records in the KPI Administration screen's Employee Objective KPI view. The Employee Objective KPI view shows fixed values for KPIs in past periods, as well as KPIs for the current period with values that typically change.

The Baseline value for the KPI in the Employee Objective KPI record is the value of the KPI at the KPI Start Date. The KPI Start Date defaults to the Period Start Date, but employees can change the KPI Start Date when they choose the KPI. The purpose of the Baseline is to show the employee and manager how the employee's performance has progressed. The Baseline value shows the change in the KPI over time within the period.

## KPI Effective End Date and Effective Start Date

When an administrator defines a KPI, the administrator can set an effective start and end date for the KPI. These fields define time periods for specific KPIs. For example, a KPI for the retail clothing industry might be Winter 2005 Sweater Sales. This KPI may be used to monitor sweater sales for a specific season or time period. KPIs no longer appear in the KPI select list after the KPI effective end date; however they appear in the KPI select list before the KPI effective start date.

## KPI Update Frequency

Each KPI has a value associated with it. This value is populated using the selected Update Method. For more information on Update Methods, see ["KPI Attributes" on page 106](#).

If the Update Method is Siebel Analytics (Siebel Analytics is retrieving the value and returning it to the Siebel Data Model), then the Update Frequency value is used. Siebel Analytics only retrieves the value of the KPI when the Performance Scorecard application requests it. The Update Frequency is number of days that pass before the Scorecard application requests that Siebel Analytics retrieve the Value of the KPI, and return the value to the Siebel Data Model. Update Frequency is defined for each individual KPI.

For example, if the Update Frequency for the KPI Company Revenue is three days, then on each third day the scorecard application asks the Siebel Analytics Server to get the KPI Value and send it back to Siebel Data Model.

### **Tracking Frequency and KPI Values**

The Performance Scorecard application can provide a trend chart for a KPI. The tracking frequency is defined for each KPI and determines how frequently the application records the KPI value. For example, if the user wants to see a weekly trend chart of the KPI, then the administrator sets the tracking frequency to Weekly.

When the tracking frequency value is reached, the KPI value is recorded in the tracking table so that the trend can be shown. The user must be using the Siebel Analytics Dashboards to see the trend charts in the Performance Scorecard view.

# Working with the KPI Administration Screen

KPIs are defined using the Administration - Key Performance Indicators screen. Figure 9 shows the KPI Administration screen, its associated views, the link bar, and the Refresh, Synchronize, and Track buttons. Using the KPI Definitions list, the administrator defines a KPI and its attributes.

Key fields include the following:

- The Global Value field in the More Info form holds the current value for a Global KPI.
- The Global Employee Value field in the Global Employee KPI view holds the current value for Employee Specific KPIs.
- The Employee Objective KPI view holds the value of the KPI for that specific employee for that specific time period.

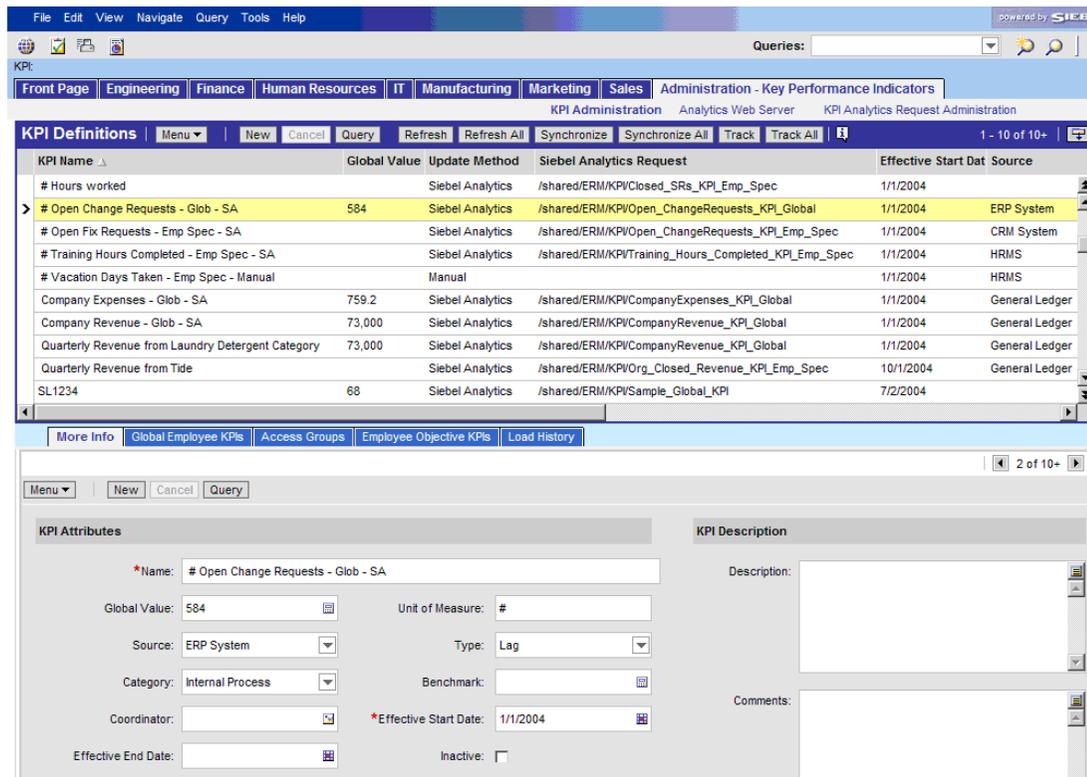


Figure 9. Key Performance Indicators Administration Screen

## Refresh and Refresh All Buttons

The KPI Value is derived from one of three sources. If the Update Method is Siebel Analytics, the Performance Scorecard application asks Siebel Analytics to retrieve the value for the KPI and return the value to the Siebel Data Model. This process is called Refresh. The refresh process uses a functionality called Analytics Data Load and occurs automatically on a scheduled basis defined by the update frequency. The workflows that are automated during installation handle the automatic portion of this process.

You can manually initiate the Refresh process for an individual KPI by clicking the Refresh button. Clicking Refresh All updates all the KPIs with Update Method of Siebel Analytics and can impact performance. Depending on how many KPIs you are refreshing, the process can take an extended period of time, typically one to two minutes for each KPI.

## Synchronize and Synchronize All Buttons

The synchronization process for KPIs automatically occurs during the Refresh process with the Siebel Analytics Update Method.

To keep the Employee Objective KPI Values current, administrators can manually synchronize the value from the Global Employee KPI view or from the More Info view by changing the value in the Global value field using KPI Administration, and then clicking Synchronize. The Objective KPI value is updated in Employee Objective KPIs list view. Manual synchronization is performed for individual KPIs by clicking Synchronize, or using Synchronize All to synchronize all the KPIs at one time.

Synchronization only updates the value in the Employee Objective KPI view for KPIs associated with objectives in the current period that have Employee KPI Start Date earlier than the current date and an Employee KPI End Date after the current date.

## Track and Track All Buttons

An organization's executives and managers track KPI trends using the charts in the Performance Scorecard view. The tracking frequency is defined for each KPI, and this value determines how frequently the application records the KPI value. For example, if managers want to see a weekly trend chart for a particular KPI, the administrator sets the tracking frequency to weekly.

You can manually track a KPI Value at a specific time using the Track button. Track All records the value for all KPIs. Depending on the number of KPIs, using Track All can impact performance. Using Track and Track All has no effect on the tracking frequency.

**NOTE:** To see a history of values for a KPI, you must query the database directly. You can also configure a view to show a history of values for a KPI.

[Appendix A, "Performance Scorecard Reference"](#) includes figures that show the processes that occur when users click the Refresh, Track, or Synchronize buttons. The appendix also includes technical references.

## Value Last Update Time Stamp

The Value Last Update time stamp shows the last time the KPI Value (either the Global Value or the Global Employee KPI Value) changed. The change can either be the last time the Refresh button was clicked for a KPI with an Update Method of Analytics, or the last time the automatic Refresh process took place. You can determine the next time the KPI Value is refreshed by adding the update frequency to the Value Last Update field. This field can be found in the Global Employee KPI view and the More Info view.

The Value Last Update time stamp also changes when an administrator manually changes the KPI Value.

## Value Last Track Time Stamp

The Value Last Track time stamp shows the last time the KPI Value was recorded in history. You can predict the next time it will be tracked based on the tracking frequency and the Value Last Track time stamp. Clicking the Track button updates the timestamp.

## Employee Objective KPIs View

This read-only view, used as a reference by administrators, shows all of the Employee Objective KPI records. The view lists each employee who has selected a specific KPI for a specific period, and how well the employee performed during that period. The value field is specific to the KPI for the employee for a specific time period.

To synchronize the overall KPI value with the employee objective KPI value for the current objective period, change the value in Global value field in KPI Administration and click synchronize. The Objective KPI value gets updated in Employee Objective KPIs list view. For manual KPIs, this is a required step. For KPIs that are updated using Siebel Analytics, synchronization automatically occurs when the KPI is refreshed from Siebel Analytics. (A manual synchronization is not required for a KPI that has an Update Method of Siebel Analytics.) For more information, see [“Refresh and Refresh All Buttons” on page 112](#) and [“Synchronize and Synchronize All Buttons” on page 112](#).

## Load History View

This view is useful when troubleshooting or auditing a KPI that has an Update Method of Siebel Analytics. Each time that specific KPI is refreshed from Siebel Analytics, the load history view records the following:

- **Load errors.** If load errors occur, these errors are listed.
- **The number of rows loaded.** For example, if you are expecting 100 employee rows to be loaded, but only 30 rows are loaded then you know that there may be a problem with the KPI Request in Siebel Analytics.
- **The task start and end time.** You can determine if the Siebel Analytics Server is spending an excessive amount of time on a specific KPI Request. You can also correlate the start and end time with the Value Last Update field.

# Process of Administering and Using KPIs and Performance Scorecard

This process represents the tasks that are carried out by an administrator to set up KPIs and Performance Scorecard. Your company may follow a different process according to its business requirements.

## Administrator Procedures

- 1 [Specifying a Different Analytics Server for KPI Value Calculation on page 114](#)
- 2 [Creating List Subject Areas and Setting Responsibilities for Analytics KPIs on page 116](#)
- 3 [Creating a KPI Request in Siebel Analytics on page 117](#)
- 4 [Defining Key Performance Indicators, Update Methods and Access Groups on page 122](#)

## End-User Procedure

- 1 [Working with Objectives, KPIs and Scorecard \(End User\) on page 125](#)

# Specifying a Different Analytics Server for KPI Value Calculation

By default the Performance Scorecard application uses the default Analytics server. (See [“Configuring Server Parameters for ERMAAdmin Object Manager” on page 100.](#)) Your organization can use more than one server to retrieve KPI values. If you want to use multiple Analytics Servers to retrieve KPI values, complete the steps in the following procedure. If you plan to use the default Analytics server for KPI values, then omit this procedure.

The Siebel Analytics Server should already be set up before you begin. For more information about setting up the Siebel Analytics Server, see *Siebel Analytics Server Administration Guide*. After the Analytics Server is set up, you must duplicate existing Web Services ports, and copy them to the new Analytics Web server parameters.

This task is a step in [“Process of Administering and Using KPIs and Performance Scorecard” on page 114.](#)

### *To create new Web Services ports*

- 1 Navigate to the Administration - Web Services screen > Outbound Web Services view.
- 2 In the Outbound Web Services list, query for \*Service\* in the Name field.
- 3 Select a record in the list, and in the Service Ports list, copy a port record, and change the name of the new port record.

For example, if you selected SAWSessionService in the Web Services list, copy a port record and change the name of the new port record to something similar to SAWSessionServiceSoapKPI\_2.

- 4 Complete [Step 2](#) and [Step 3](#) for three Web Services with the following names:
  - SAWSessionService
  - JobManagementService
  - WebCatalogService

### *To create a new server*

- 1 Navigate to the Administration - Key Performance Indicator screen > Analytics Web Server view.
- 2 In the Servers list, create a new server record, name the server, and complete the fields.

For example, name the server Default KPI Analytics Server\_2.

- a Set an administrator name in the User ID field and a Password for the Analytics server.

This user should have full visibility and responsibility in Analytics.

- b Set the server Type as Siebel Analytics Web Server.

- c In the Analytics Web Server list, create three new Parameter Type records, choosing the newly created and named Web Services.

For example, if the Parameter Type is Authentication Services, the Outbound Web Service Port you select might be SAWSessionServiceSoapKPI\_2.

- 3 Add the server to the Object Manager.

**NOTE:** If you wish this new Analytics server to be the server for all Object Managers on this specific Siebel Server, proceed to [Step 4](#).

- a Navigate to the Administration - Server Configuration screen > Servers view.

- b In the Siebel Servers list, locate the name of the current Siebel server.

- c Click the Components tab (middle section), query for the Object Manager that is to be associated with the new Analytics server.

For example, query for \*Call Center\*.

- d In the bottom list, click the Parameters tab, query for \*Default\* and then select Default Analytics Web server.

- e Change the Value on Restart to the name of the Analytics Server you created in [Step 2](#).

- 4 (Optional) Complete the following tasks if the Analytics server is to be the server for all Object Managers.

**NOTE:** Omit this step if you completed [Step 3](#).

- a Navigate to the Administration - Server Configuration screen > Servers view.

- b In the Siebel Servers list, locate the Siebel Server.

- c In the middle list, Parameters tab, query for \*Default\* and select the Default Analytics Web Server.

- d Change the Value on Restart to the name of the Analytics Server you created in [Step 2](#).

After completing this procedure, the new Analytics server is the default server; all new KPIs use this server.

You can still use the old server when you create a new KPI by navigating to the Administration - Key Performance Indicator Administration screen, selecting a KPI record, and changing the value in the column titled Siebel Analytics Server. This field is preconfigured to be read-only. If you plan to choose the Analytics server for each KPI, you must use Siebel Tools to change the field properties to Read/Write.

## Creating List Subject Areas and Setting Responsibilities for Analytics KPIs

You may want to create a KPI in Siebel Analytics that is derived from a subject area that you do not see when you navigate to the KPI Analytics Request Administration screen. To create KPIs in Siebel Analytics, you need subject areas included in the List Format screen. These subject areas are different than subject areas typically included in the Siebel Answers screen. However, list format subject areas can be created based on an existing Siebel Answers subject area.

This task is a step in [“Process of Administering and Using KPIs and Performance Scorecard”](#) on [page 114](#).

### *To create list subject areas*

- 1 Log into Siebel Analytics Administration Tool as the administrator.
- 2 From the application-level menu, choose Manage > Marketing.
- 3 From the Marketing Metadata window, choose Actions > New > List Catalog from the menu.  
The List Catalog window appears.
- 4 From the List Catalog windows, click the ellipsis (...) button adjacent to the Name field, browse to find the Subject Area that you want to become a list format subject area, and select the subject area.
- 5 Click OK in the Browse window.
- 6 From the List Catalog window, click Permissions, and in the Permissions window, select the Read check boxes for the responsibilities that can view the subject area.
- 7 Click OK in the Permissions window, click OK in the List Catalog window, and then close the Marketing Metadata window.
- 8 Save the changes to the rpd.

### *To change the responsibilities that can view a list subject area*

- 1 Log into Siebel Analytics Administration Tool as the administrator.
- 2 In the upper menu, choose Manage > Marketing.

- 3 From the Marketing Metadata window, double-click on the subject area that you want to update, and then click Permissions.
- 4 In the Permissions window, select the check box for each responsibility that you want to be able to view the subject area.
- 5 Click OK, click OK again, and close the window.
- 6 Save the changes to the rpd.

## Creating a KPI Request in Siebel Analytics

Administrators and KPI administrators can create Global KPIs and Employee-Specific KPIs using Siebel Analytics Answers functionality. When you specify Siebel Analytics as the Update Method for the KPI, and then choose the Siebel Analytics KPI Request, the Analytics server determines the value of the KPI. All KPIs are created in Siebel Analytics in the Data Load Format folders in the Siebel Analytics Web Catalog (KPI Analytics Request Administration > My Data Load Formats).

There are two types of KPIs:

- **Global KPI.** This type of KPI has the same value for all employees. An example of this type of KPI is company revenue. The value of the KPI is always the same
- **Employee Specific KPI.** This type of KPI has a different value for each employee. Performance Review Score is an example of this type of KPI. Each employee sees a KPI value that is specific to the employee.

This task is a step in [“Process of Administering and Using KPIs and Performance Scorecard” on page 114](#) and includes the following procedures:

- [“Defining a Global KPI Request” on page 117](#)
- [“Creating an Employee-Specific KPI Request” on page 119](#)

## Defining a Global KPI Request

Complete the steps in the following procedure to define a Global KPI.

### *To define a Global KPI Request*

- 1 Navigate to the Administration - Key Performance Indicators screen and select KPI Analytics Request Administration from the link bar.

You can also log in to Analytics Web as a user with the KPI Administrator responsibility, and click the Marketing link.

- 2 Create a new folder for the KPI.
  - a In the List Formats tab list, scroll down to locate the folders listed under Shared Data Load Format.

- b** Navigate to ERM/KPI.

If a folder exists that you want to use to save the KPI request, then proceed to [Step 3](#). If not, continue.

**NOTE:** You may want to save Global KPIs in a different folder than Employee Specific KPIs for organizational purposes.
- c** Click the Manage Catalog button.
- d** Navigate to the folder location (ERM/KPIs).
- e** Click the Create New Folder link.
- f** Name the folder, click Create Folder, and then close the window.
- 3** In the Select a List Area list, click the link for the KPI that you want to calculate.
- 4** From the Columns list, choose any dimension column.
- 5** From the subject area navigation, choose the fact column that represents the KPI you want to calculate.
- 6** Apply the necessary filters so that the result of the request is a two-column by one-row table. To see a preview of the results, continue through to [Step 11](#).
- 7** In the first column click the Edit Formula button, and perform the following steps:

  - a** Select the Custom Heading check box, and complete the following fields:

    - Table Heading (Integration Component Name) = ERM KPI Definition Admin
    - Column Heading (KPI\_ID) = Id
    - Column Formula '@{KPIId}{0}' (Be sure to include the single quotes.)
    - Aggregation Rule = Default
  - b** Click OK.
- 8** In the second column (the KPI column) click the Format button, and perform the following tasks:

  - a** In the Column Properties Column Format tab, select the Custom Headings check box, and complete the following fields:

    - Table Heading (Integration Component Name) = ERM KPI Definition Admin
    - Column Heading (KPI Value) = Value
  - b** Click the Value Format Tab, and set the following values:

    - Select the Override Default Data Format check box.
    - In the Treat Number As field, choose Number.
    - Negative format = Minus: -123
    - Digits = 0 decimal places
    - Do not select the Use 1,000 separator check box.
  - c** Click OK.

- 9 From the List Formats screen, click the Options tab, and in the Attributes form, set the following field value:  
Set Purpose = Analytics Data Load
- 10 Click the Header and Footer tab, and in the Header window, enter the following:  
# ERM KPI Defi ni ti on Admi n EAI  
# <do not click return>  
**NOTE:** End of file is to the right of the space after the second #.
- 11 Click the Preview tab, and perform the following tasks:
  - a Set the Destination Folder path to a shared read-write folder.  
For example, set the destination folder path to <MarketingFileSystem>c:\sea78\fs\.
  - b Click Generate Preview.
  - c Set Preview Size = 4.
  - d Click OK.
- 12 Verify that text similar to the following text is generated:  
# ERM KPI Defi ni ti on Admi n EAI  
# ERM KPI Defi ni ti on Admi n. Id, ERM KPI Defi ni ti on Admi n. Val ue 0, 68
  - a If the result is not 0,<#> (two columns, one row), then return to [Step 6](#) and apply filters so that the result is a one row and two column result.
  - b Click the Save Icon in the upper right corner of the screen, and save the KPI as <KPI Name> in the KPI folder that you created in [Step 2](#).

## Creating an Employee-Specific KPI Request

Complete the steps in the following procedure to create an employee-specific KPI request.

### *To create an employee-specific KPI request*

- 1 Navigate to the Administration - Key Performance Indicators screen and select KPI Analytics Request Administration from the link bar.  
You can also log in to Analytics Web as a user with the KPI Administrator responsibility, and click the Marketing link.
- 2 Create a new folder for the KPI by completing the following tasks:
  - a In the List Formats tab list, scroll down to locate the folders listed under Shared Data Load Format.

- b** Navigate to ERM/KPI.

If a folder exists that you want to use to save the KPI request, then proceed to [Step 3](#). If not, continue.

**NOTE:** You may want to save Global KPIs in a different folder than Employee Specific KPIs for organizational purposes.

- c** Click the Manage Catalog button.
- d** Navigate to the folder location (ERM/KPIs).
- e** Click the Create New Folder link.
- f** Name the folder, click Create Folder, and then close the window.

- 3** From the Columns list, choose any dimension column.

- 4** In the Select a List Area list, click the link for the KPI that you want to calculate.

- 5** Choose the employee\_ID column from the employee dimension.

**NOTE:** In some subject areas employee\_ID column may not be available. Use the person ID column or other ID column to identify the employee's ID.

- 6** From the subject area navigation, choose the fact column that represents the KPI you want to calculate.

- 7** Apply the necessary filters so that the result of the request is a three-column by multiple-row table.

To see a preview of the results, continue through to [Step 13](#).

- 8** In the first column (any dimension column) click the Edit Formula button, and perform the following steps:

- a** Select the Custom Heading check box, and complete the following fields:
  - Table Heading (Integration Component Name) = ERM KPI Employee Values Admin
  - Column Heading KPI\_ID = KPI Id
  - Column Formula: '@{KPIId}{0}' (Be sure to include the single quotes.)
  - Aggregation Rule = Default

- b** Click OK.

- 9** In the second column (the employee Id column) click the Format button, and perform the following tasks:

- a** In the Column Properties Column Format tab, select the Custom Headings check box, and complete the following fields:

- Table Heading (Integration Component Name) = ERM KPI Employee Values Admin
- Column Heading (Employee ID Value) = Emp Id

- b** Click OK.

- 10** In the third column (the KPI column) click the Format button, and perform the following tasks:

- Table Heading (Integration Component Name) = ERM KPI Employee Values Admin
          - Column Heading: (KPI Value) = Value
        - b** Click the Value Format tab, and set the following values:
          - Select the Override Default Data Format check box.
          - In the Treat Number As field, choose Number.
          - Negative format =Minus: -123
          - Digits = 0 decimal places
          - Do not select the Use 1,000 separator check box.
        - c** Click OK.
- 11** From the List Formats screen, click the Options tab, and in the Attributes form set the following field value:

Set Purpose = Analytics Data Load
- 12** Click the Header and Footer tab, and in the Header window enter the following:

```
# ERM KPI  Empl oyee Val ues Admi n EAI  
# <do not click return>
```

**NOTE:** End of file is to the right of the space after the second #.
- 13** Click the Preview tab.
  - a** Set the Destination Folder path to a shared read-write folder.

For example, set the destination folder path to <MarketingFileSystem>c:\sea78\fs\.
  - b** Click Generate Preview.
  - c** Set Preview Size to 4, and then click OK.
  - d** Verify text similar to the following is generated:

```
# ERM KPI  Empl oyee Val ues Admi n EAI  
  
# ERM KPI  Empl oyee Val ues Admi n. KPI  Id, ERM KPI  Empl oyee Val ues Admi n. Emp Id, ERM  
KPI  Empl oyee Val ues Admi n. Val ue  
  
0, 1-11Z2, 22. 80  
  
0, 1-5YQ1, 28. 50  
  
0, 1-H1NP, 17. 10  
  
0, 1-T7P5, 17. 10
```

If the result is not 0,<Emp\_Id>,<#> then go back and apply filters so that the result is a multi-row and 3-column result.

14 Click Save, and save the KPI as <KPI Name> in the KPI folder that you created.

## Defining Key Performance Indicators, Update Methods and Access Groups

When you define a Key performance indicator, you must first decide if the KPI is an Employee-Specific KPI or a Global KPI. You must also decide how the KPI value will be populated.

If the KPI is a Global KPI, then the value entered in the Global Value field is used to track the KPI. If the KPI is an Employee-Specific KPI, the administrator adds the employees who are tracking the KPI and the values using the Global Employee KPI view.

The selected Update Method for the KPI, either manual or Siebel Analytics, determines how the KPI value is populated. If the Update Method is Siebel Analytics, you must also specify the Update Frequency and the Siebel Analytics Request that is to be used. For more information, see [“Configuring the Performance Scorecard Dashboard” on page 102](#).

To define a key performance indicator, complete the steps in the following procedures:

- [“Creating a KPI Definition” on page 122](#)
- [“Selecting KPI Access Groups” on page 124](#)
- [“Adding Employees for an Employee-Specific KPI” on page 125](#)

This task is a step in [“Process of Administering and Using KPIs and Performance Scorecard” on page 114](#).

### Creating a KPI Definition

Complete the steps in the following procedure to define a Key performance Indicator.

#### *To define a KPI*

- 1 Navigate to the Administration - Key Performance Indicators screen.
- 2 In the KPI Definitions list add a record and complete the name and description.  
End users select the KPI based on the name and description. As part of the description, specify whether or not the KPI is Global or Employee Specific.

3 In the More Info view, complete other relevant fields.

The following table describes the fields in the order that they should be completed.

Fields	Comment
Update Method	If an administrator will enter the value to update the KPI, the update method is Manual. If Siebel Analytics will be used to update the KPI, the update method is Siebel Analytics.
Unit of Measure	The Unit of Measure for the KPI. For example, % (for percentage), \$ (for dollars), or # (for number of people).
Source	The predefined source for the KPI. This value represents the system of record for this KPI, for example, CRM System, or HRMS (Human Resources Management System).
Type	Options are Lead, Lag and Static. A KPI of type Lag is a lagging indicator. For example, closed revenue is an indicator of past performance (lagging). KPIs of type Lead are for leading indicators such as opportunity revenue. KPIs of type Static indicate current conditions.
Category	A predefined category for the KPI. You can set up your own categories using the Administration - List of Values screen. Examples of categories are Customer, Internal Process, and Training.
Benchmark	If your organization has benchmark data for the KPI, enter the value in this field. For example, the average Employee Turnover may be 12% for your industry. You can enter that value in the Benchmark field for the Employee Turnover KPI.
Coordinator	Some organizations assign an employee to coordinate and oversee a KPI to make sure that it is being properly administered. The administrator gives the coordinator access to the KPI Administration screen by giving the coordinator KPI Administrator responsibility.
Effective Start Date	The date the KPI is effective.
Effective End Date	The date that the KPI is no longer visible to employees.
Private	If the Private check box is not selected, all employees have access to the KPI. Selecting this check box controls accessibility to the KPI using Access Groups. Specify which predefined groups should have access using the Access Groups view. For more information, see <a href="#">"Selecting KPI Access Groups" on page 124</a> .
Inactive	If this check box is selected, the KPI is not visible to employees.
Global Value	If the KPI is a Global KPI, and the update method type is Manual, enter a value in this field. If the KPI is global and the update method is Siebel Analytics, the field value is automatically populated during the refresh process. If the KPI is not global (it is employee-specific), then do not enter a value in the field.

Fields	Comment
Update Frequency	If Siebel Analytics is specified as the Update Method for the KPI, you must choose an Update Frequency. Only whole numbers are allowed for this value. You must also choose a Siebel Analytics Request.
Siebel Analytics Request	The Siebel Analytics Request is a request for the Analytics server to determine the value of the KPI. Click the select button in this field to navigate to the Siebel Analytics Web Catalog.  If you have not already created a Siebel Analytics Request for the KPI, complete the procedure Creating a KPI Request in Siebel Analytics.
Formula	(Optional) Enter the reference formula, if this is a manually calculated KPI and you need to reference that formula at a later date.
SQL	(Optional) If you are manually querying another data source, record the SQL used for the query in this field.
Comments	Add notes in this field.

The following table describes field values for creating a KPI definition that are derived from Lists of Values. The values for each LOV appear in the drop-down list for the field. These values can be edited from the Administration - List of Values screen.

Fields	LOV Type
Source	KPI_Source_Code
Type	KPI_TYPE_CD
Category	KPI_CATEGORY_CD

## Selecting KPI Access Groups

If you selected the Private check box when defining the KPI, employee access to this active KPI is controlled by Access Groups. You specify these access groups using the KPI Administration screen's Access Groups view. You can add members to the predefined access groups using the Administration - Groups screen.

### To select KPI Access Groups

- 1 Navigate to the Administration - Key Performance Indicators screen.
- 2 Create a New KPI record or choose an existing KPI record, and then select the Private check box to make the Private field active.
- 3 Click the Access Groups view tab.
- 4 In the Access Groups list, click new and select the Access Group.

Users in this access group can see and select this KPI. Nonmembers of the access group cannot see or select this KPI.

## Adding Employees for an Employee-Specific KPI

Complete this procedure if the KPI is Employee Specific and has an update method of Manual. This task describes how to manually add the employees who are tracking the KPI. The Value field shows the most current value for the KPI.

**NOTE:** If the KPI is Employee Specific and has an update method of Siebel Analytics, then you should omit the following procedure, because the employee and KPI values are automatically populated during the update process.

### *To add employees tracking an employee-specific KPI*

- 1 Navigate to the Administration - Key Performance Indicators screen.
- 2 In the KPI Definitions list, select the KPI, and then click the Global Employee KPIs view tab.
- 3 Add a record and select the employee.
- 4 Enter a value for the KPI.

**NOTE:** To synchronize with the values found in the Scorecard and the Employee Objective KPIs view, you must click the Synchronize button. For more information, see [“Synchronize and Synchronize All Buttons” on page 112](#).

## Working with Objectives, KPIs and Scorecard (End User)

This topic describes the tasks that are performed by end users to associate Key Performance Indicators with Objectives.

The tasks are:

- [Selecting a KPI for an Objective on page 125](#)
- [Adding Attributes to Key Performance Indicators on page 126](#)
- [Reviewing the Objectives Scorecard on page 127](#)
- [Reviewing an Employee's Performance Against KPIs on page 128](#)

Users should understand the concepts and be proficient in the use of the Siebel Objectives and Reviews application before using the Performance Scorecard application. For more information, see [Chapter 3, “Setting Up Objectives and Reviews.”](#)

This task is a step in [“Process of Administering and Using KPIs and Performance Scorecard” on page 114](#).

## Selecting a KPI for an Objective

When an employee creates an objective, the employee can associate one or more KPIs with the objective.

### *To associate a performance objective with a KPI*

- 1 Navigate to the Performance Management dashboard and drill into a period where the objectives are Not Started or Employee-in-Progress.
- 2 Click the Objectives tab, and enter data for an individual objective.  
Click New to create a new objective.  
You can view the KPI currently associated with the objective by clicking in the KPIs field.
- 3 From the KPI dialog box, click New to view the available list of KPIs.  
If the desired KPI does not appear in the available KPIs list, contact your KPI Administrator. It may be that you do not have access to the particular KPI.
- 4 Select the KPI from the list, and enter a value in the Target and Critical fields.
- 5 (Optional) Set a Start Date and End Date if you want the dates to be different from the period start and end date.  
The Start Date must be less than the End Date and greater than (or equal to) the Period Start Date. The End Date must be greater than the Start Date and less than (or equal to) the Period End Date.
- 6 Click Save to save the KPI values.  
Close the window if you want to keep the Target and Critical values you have selected. You may add a new KPI to this objective by clicking New.

## **Adding Attributes to Key Performance Indicators**

After a user has associated the KPIs with objectives, the user can view the KPIs and add attributes using the My Key Performance Indicators view.

### *To add attributes to KPIs*

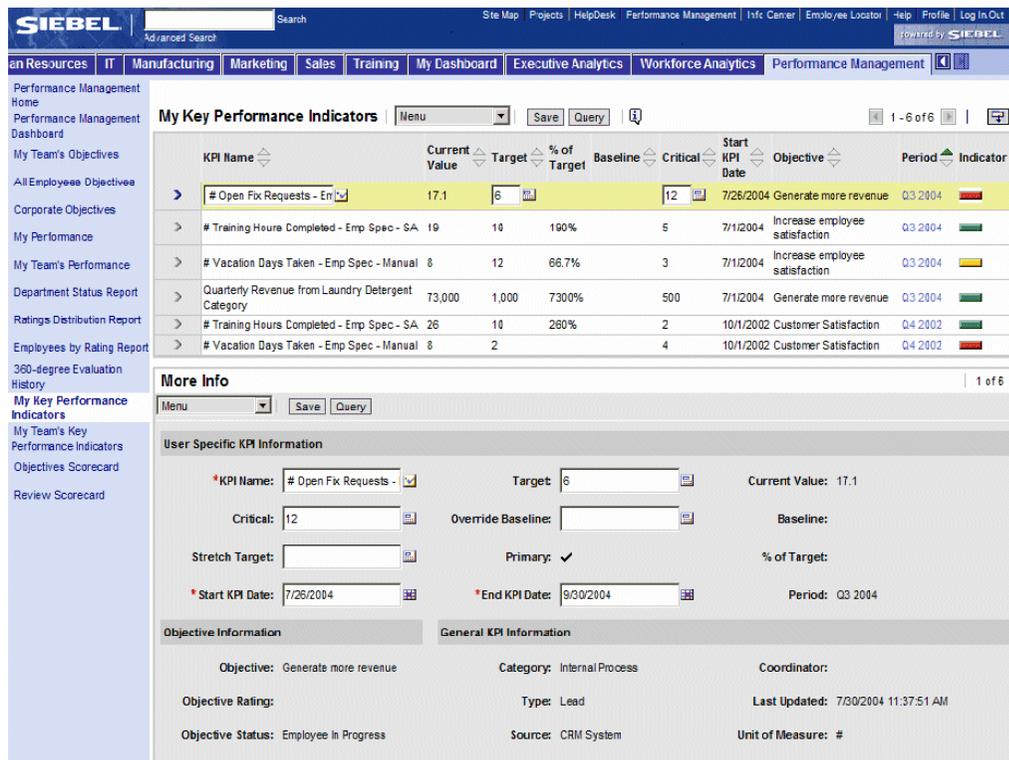
- 1 Navigate to the Performance Management dashboard and from the left navigation bar (or the link bar at top), click the My Key Performance Indicators link.

- On the My Key Performance Indicators view, select an objective, and complete the attributes in the More Info form.

You can add other attributes to KPIs and Objectives in this view as well, including the override baseline, stretch target and other values. The baseline is the value of the KPI on the KPI Start Date and is read only.

After the user has submitted the objectives, all of the KPI attributes become read-only.

The following figure shows an example of the My Key Performance Indicators view.



## Reviewing the Objectives Scorecard

After the user's objectives are approved, the KPIs and objectives appear in the Objectives Scorecard view. KPIs and Objectives from the previous period appear in the Review Scorecard view.

### To review the Objectives Scorecard

- Navigate to the Performance Management dashboard.
- From the left navigation bar (or top link bar), click the link for Objectives Scorecard.
- Click through the levels in the explorer tree on the left side of the screen to see employees below you in the positions hierarchy.

The scorecard represents the objectives of employees for the previous period.

- 4 Click Printer-Friendly, and then navigate to the Objectives screen so that the Objective Scorecard is always available.

## Reviewing an Employee's Performance Against KPIs

At the end of the performance period, a manager can drill down on an employee's objective and view how well the employee has performed compared with the objective's KPI. Managers can access scorecards for any employee below the manager's position in the reporting hierarchy.

The Review Scorecard view provides a condensed view of an employees performance during previous review periods.

### *To view an Employee's Review Scorecard*

- 1 Navigate to the Performance Management dashboard.
- 2 In the left navigation bar (or from the top link bar), click the link for My Team's Performance Indicators.
- 3 In the navigation bar, click Review Scorecard.

You can click through the levels in the explorer tree on the left side of the screen to see employees below you in the positions hierarchy. The scorecard represents the performance of employees for the previous period.

You can also click Printer-Friendly, and then navigate to the Review screen so that the Review Scorecard is always available.

# A

## Performance Scorecard Reference

This appendix includes information about Performance Scorecard processes, and frequently asked questions. It includes the following topics:

- [About the Analytics Data Loader Process on page 130](#)
- [Performance Scorecard End User Process Flows on page 132](#)
- [Process for Refreshing a KPI on page 133](#)
- [Process for Selecting a KPI from the Siebel Analytics Catalog on page 134](#)
- [Process for Selecting a KPI in Objectives and Reviews on page 134](#)
- [Process for Synchronizing KPIs on page 135](#)
- [Process for Tracking KPIs on page 135](#)
- [Process for Manual Refresh of KPIs on page 135](#)
- [Performance Scorecard Usability Solutions on page 136](#)

# About the Analytics Data Loader Process

This topic describes the background processes that occur when the Analytics data loader functionality is employed.

**NOTE:** This topic is not meant to be a step by step procedure; rather it is an overview of the basic functionality.

## Request Selection in KPI Administration (Siebel Analytics Request Column)

When a user chooses a report, a pick applet appears. This applet is derived from a virtual business component (VBC).

The VBC calls a business service, which connects to the Analytics server and then passes certain parameters such as login, password, root catalog path, and type (Analytics data loader).

The user logged into the Analytics server can then browse the catalog from the root path provided for that user (all responsibilities and visibility rights for that user are enforced at the Analytics server for the user.)

**NOTE:** The root path for Web catalog administration is configurable using Siebel Tools. For more information, see *Using Siebel Tools*.

## Refresh KPI

When the administrator clicks Refresh KPI, a business service waits on the Invoke Method from BusComp, and a business service performs logic on the KPI to see if it should be refreshed.

If the KPI needs to be refreshed, the business service passes the KPI parameters to the Marketing Analytics Data Loader business service (MDL).

The MDL business service passes certain parameters to the Siebel Analytics Server, including the administrator ID and password from the Analytics server configuration, the KPI ID, catalog path, and server ID.

The following MDL business service processes occur:

- **Impersonate.** The business service logs the administrator ID into the Analytic Server.
- **Write-to-List file.** The Analytics server generates a list file from the specified catalog path, and then inserts the KPI\_Id into this list file.
  - Because this is an asynchronous process, the job\_id is sent back to the Siebel application as the write-to-list file command is occurring.
  - The Siebel application polls the Analytics server to determine when this job\_id task is done.
  - Each time the Siebel application receives a new file from the Write-to-List file, the command Process file is called, which then calls the Import KPI workflow.

Many instances of this workflow can be running at the same time. The file is processed in the following ways, using Siebel EAI functionality:

- The process turns the Analytics-generated CSV file into a property set.

- The property set is upserted into the integration object.

The integration object is called ERM KPI Definition Employee Value EAI for employee-specific KPIs and ERM KPI Definition Admin EAI for global KPIs.

The difference between these integration objects is that the global KPI integration object receives a file from Siebel Analytics that has two columns and one row (KPI Id and KPI Value.) The employee-specific KPI integration objects receive a file from Siebel Analytics that has three columns and many rows (KPI Id, Emp Id, and KPI Value), and the number (#) of rows is the number (#) of employees that have specific values for that KPI.

The CSV files that Siebel Analytics exports are kept in the Marketing file system. The data is dropped from the integration object in the appropriate business component.

- The CSV file holds the KPI\_Id, Integration object name, and Integration component name because they are part of the Siebel Analytics request.
- The integration objects insert the data into the correct business components.

# Performance Scorecard End User Process Flows

The topics that follow show the logical process flows that occur when working with Performance Scorecard.

These process flows include:

- [Process for Refreshing a KPI on page 133](#)
- [Process for Selecting a KPI from the Siebel Analytics Catalog on page 134](#)
- [Process for Selecting a KPI in Objectives and Reviews on page 134](#)
- [Process for Synchronizing KPIs on page 135](#)
- [Process for Tracking KPIs on page 135](#)
- [Process for Manual Refresh of KPIs on page 135](#)

## Process for Refreshing a KPI

Figure 10 shows the process flow that occurs when the KPI Value is retrieved from the Siebel Analytics Server.

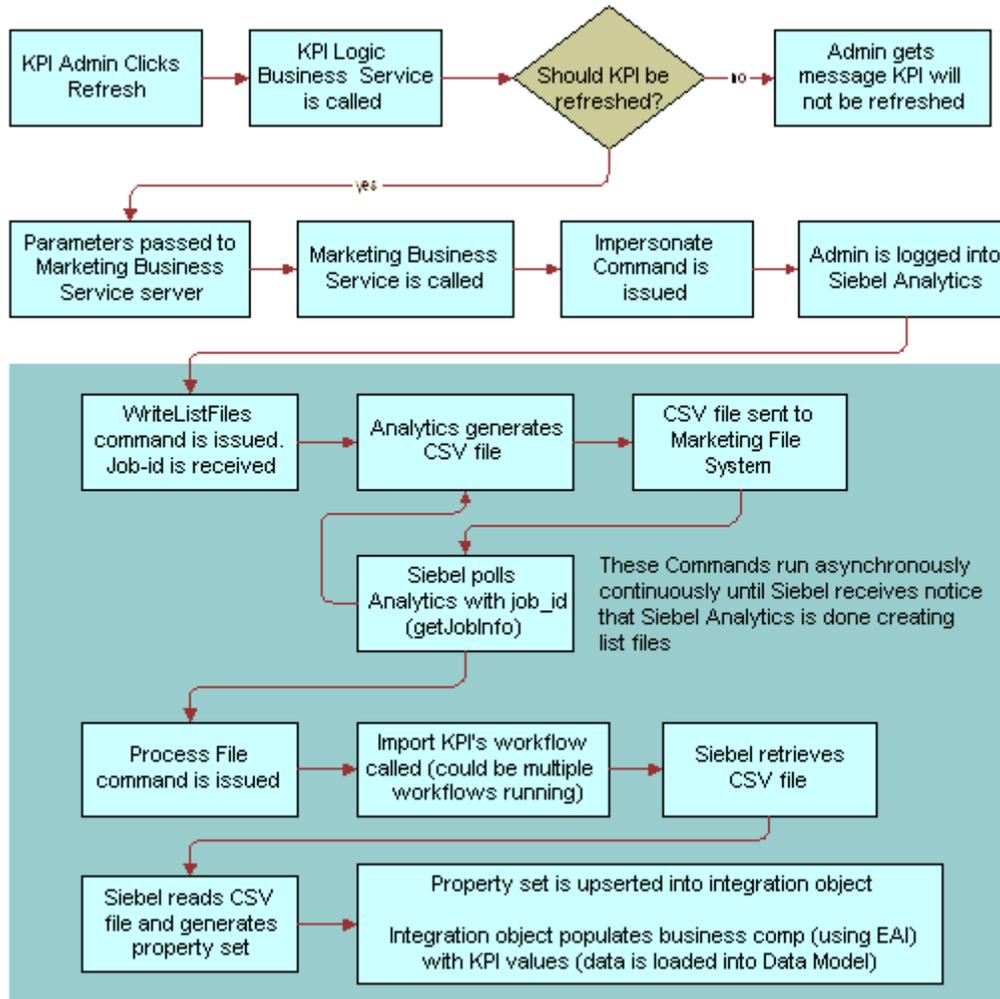


Figure 10. KPI Refresh Process Flow

## Process for Selecting a KPI from the Siebel Analytics Catalog

Figure 11 shows the process which occurs when the administrator selects a KPI from the Siebel Analytics Catalog.

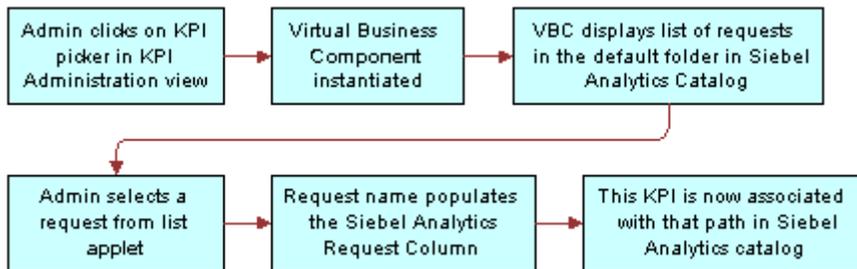


Figure 11. Selecting a KPI from the Siebel Catalog Process Flow

## Process for Selecting a KPI in Objectives and Reviews

Figure 12 shows the process which occurs when an end user selects a KPI for an objective in the Objectives and Reviews application module.

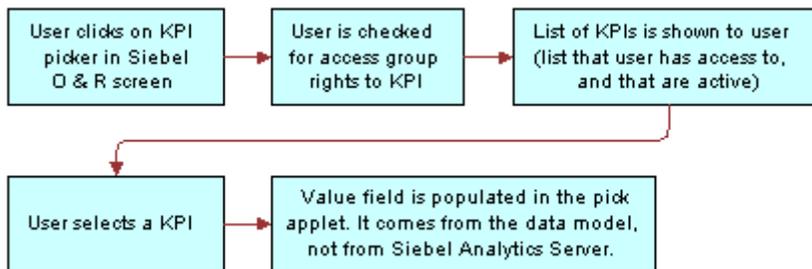


Figure 12. Selecting a KPI in Objectives and Reviews Process Flow

## Process for Synchronizing KPIs

Figure 13 shows the process that occurs when the Update Frequency is reached or the administrator clicks Synchronize.

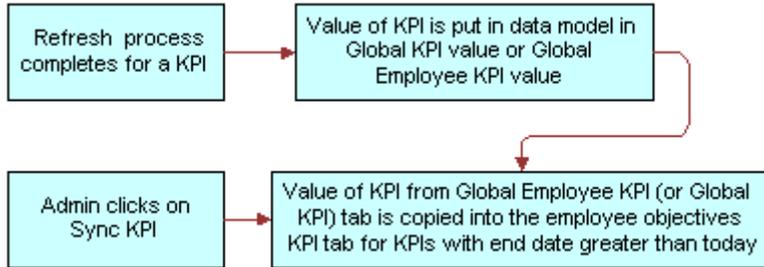


Figure 13. Synchronizing for Update Frequency Process Flow

## Process for Tracking KPIs

Figure 14 shows the process which occurs when the administrator clicks Track KPI or the Tracking Frequency is reached.

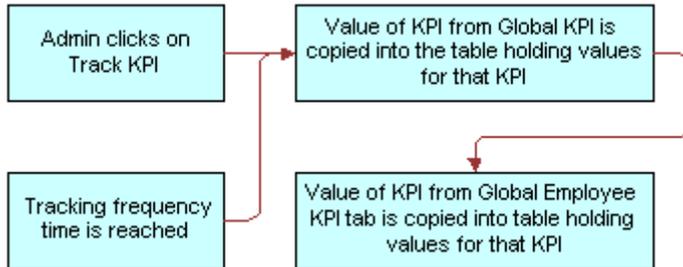


Figure 14. Tracking KPIs Process Flow

## Process for Manual Refresh of KPIs

Figure 15 shows the process which occurs when the administrator clicks the Refresh button to refresh KPIs.

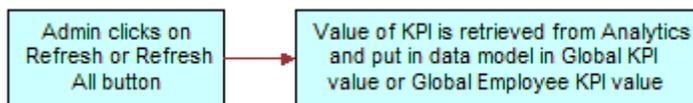


Figure 15. Manual Refresh of KPIs Process Flow

**NOTE:** During a manual refresh of KPIs, a synchronization does not occur. Synchronization occurs during an automatic refresh, or if the administrator clicks the Sync button to initiate a manual synchronization.

# Performance Scorecard Usability Solutions

This topic provides information and solutions to practical issues for users working with Performance Scorecard.

## Edits to the Employee Objective KPI Record by Multiple Users

If multiple users (for example, an end user and an administrator) edit the Employee Objective KPI Record at the same time, the following error message is displayed:

The Selected Record has been modified by another user since it was retrieved. Please Continue. (SBL-DAT-00523)

The Employee Objective KPI view (Administration - Key Performance Indicators screen) is actually accessing the Employee Objective Record. Since Performance Scorecard uses the same record edit functionality as is employed in other Siebel applications, the second user to access the record sees the error message stating that another user has edited the record. It does not matter if the second user is the administrator or an employee; the first user to access the record always has preferential access and the ability to save the change to the database. After the first user steps off the record, the next user can edit the record.

If you get this error message, click OK, step off the record, step back on the record and perform the action.

## Last Update Field in the KPI Administration Screen's Global Employee KPI View

The Last Update field provides the administrator with a timestamp of when the KPI was last refreshed or when the KPI value was manually changed. If the KPI is a manual KPI, and the user does not change the *value* of the KPI, the Last Update field is not updated. If the user changes the value of the KPI for a specific employee, the Last update column is updated. The Last Update value for other employees is not updated unless the values of the employees' KPIs are changed.

The following list provides a summary of this functionality:

- If the actual value of the KPI changes (global or employee specific), then the last Update time stamp is changed.
- If the employee name changes on an employee-specific KPI, then the Last Update timestamp is changed.
- If the administrator clicks Refresh for a Siebel Analytics Request, the Last Update timestamp is updated on the form applet for each employee that is listed in the Global Employee KPI (even if an employee is not part of the list that comes from Siebel Analytics).

## Siebel Analytics Web Server Field in KPI Administration

The Analytics Web Server field identifies which Analytics Web Server is being accessed to calculate the KPI. This field is read-only by default. Some organizations may want the administrator to be able to specify another Analytics Web Server to calculate different KPIs. In this case, the field properties must be changed to read-write using Siebel Tools. The administrator can then pick a different Analytics Web Server from this field. For more information, see [“Configuring the Performance Scorecard Dashboard” on page 102](#).

## Usage of Numbers and Decimals for the Update Frequency?

Only whole numbers may be entered in the Update Frequency field. Decimals and value of 0 are also not valid entries. If you want KPIs to be refreshed more frequently than one day, customization is required.

## List of Values and Tracking a KPI

The preconfigured list of values are the only available Tracking frequencies. If you want to track the KPI at a different time interval than what is listed in the list of values, then customization beyond simply changing values using List of Values Administration is required. You must customize the values to actually change the frequency so that tracking occurs at a frequency different than those provided in the preconfigured List of Values.

## Fewer Than Expected Employees Listed in the Global Employee KPI View

If you are expecting 100 employee rows to be loaded in the Global Employee KPI view when the KPI is refreshed to Siebel Analytics, but only 30 rows are loaded, there may be a problem with the KPI Request in Siebel Analytics. You can see how many records are being loaded for each refresh in the Data Load view. Check the KPI request in Siebel Analytics, specifically the preview, to make sure that the result set is generating the employees you expect.

## Refresh Process for a KPI Takes Excessive Time

The Data Load view shows the refresh task start and end time so you can see if the Siebel Analytics Server is spending an excessive amount of time on a specific KPI Request. Check this view for the time required for a previous load of this KPI. If the previous load time duration is short, then there may be a problem with the Analytics server. Verify that the Analytics server is operating correctly.

## Automatic Synchronize and Refresh Processes Do Not Occur

If a KPI that should automatically synchronize or refresh does not seem to be updating according to the specified frequency, check the Repeating Server Job to make sure that the server job is starting and running correctly. For more information, see [“Scheduling a Repeating Server Job for KPIs” on page 101](#). Check the Analytics server to see if the server is functioning properly and that the KPI Request is functioning properly. Check the Data Load view to see when the most recent refresh occurred, and whether the result was successful or produced an error.



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