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# PeopleSoft Enterprise ePerformance 9.1 PeopleBook

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**November 2010**

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# PeopleSoft Enterprise ePerformance Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft Enterprise HRMS Application Fundamentals.

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## PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise ePerformance.

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## PeopleSoft Enterprise HRMS Application Fundamentals

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

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**Note.** One or more pages in PeopleSoft Enterprise ePerformance operate in deferred processing mode. Deferred processing is described in the preface in the *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*.

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### See Also

*PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "PeopleSoft Enterprise HRMS Application Fundamentals Preface"

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## PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.

- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

## Chapter 1

# Getting Started with ePerformance

This chapter discusses:

- ePerformance overview.
- ePerformance business processes.
- ePerformance integrations.
- ePerformance implementation.

---

## ePerformance Overview

PeopleSoft Enterprise ePerformance is a self-service evaluation management application for managers, employees, and human resources (HR) administrators. You can use ePerformance as a tool for planning, collaboration, communication, assessment, and monitoring evaluations for two purposes: performance and development.

Performance evaluations typically assess and plan employee performance to meet current job requirements and administer salary treatments; while development evaluations are used to assess and plan employee development needs either because of gaps in the skill set that is required for a current job or to meet future requirements.

ePerformance supports the entire planning and evaluation process, from planning and aligning employee performance or development goals with enterprise objectives, through assessing and rewarding employee performance results within the right behaviors.

---

**Note.** Throughout this PeopleBook, we refer to evaluation as a generic process name that includes both performance and development processes. The term *performance* in this PeopleBook is used to mean both performance and development, unless otherwise stated.

---

ePerformance provides you with the flexibility to establish evaluations for different purposes by setting up document templates that define evaluation processes. With this application, you can:

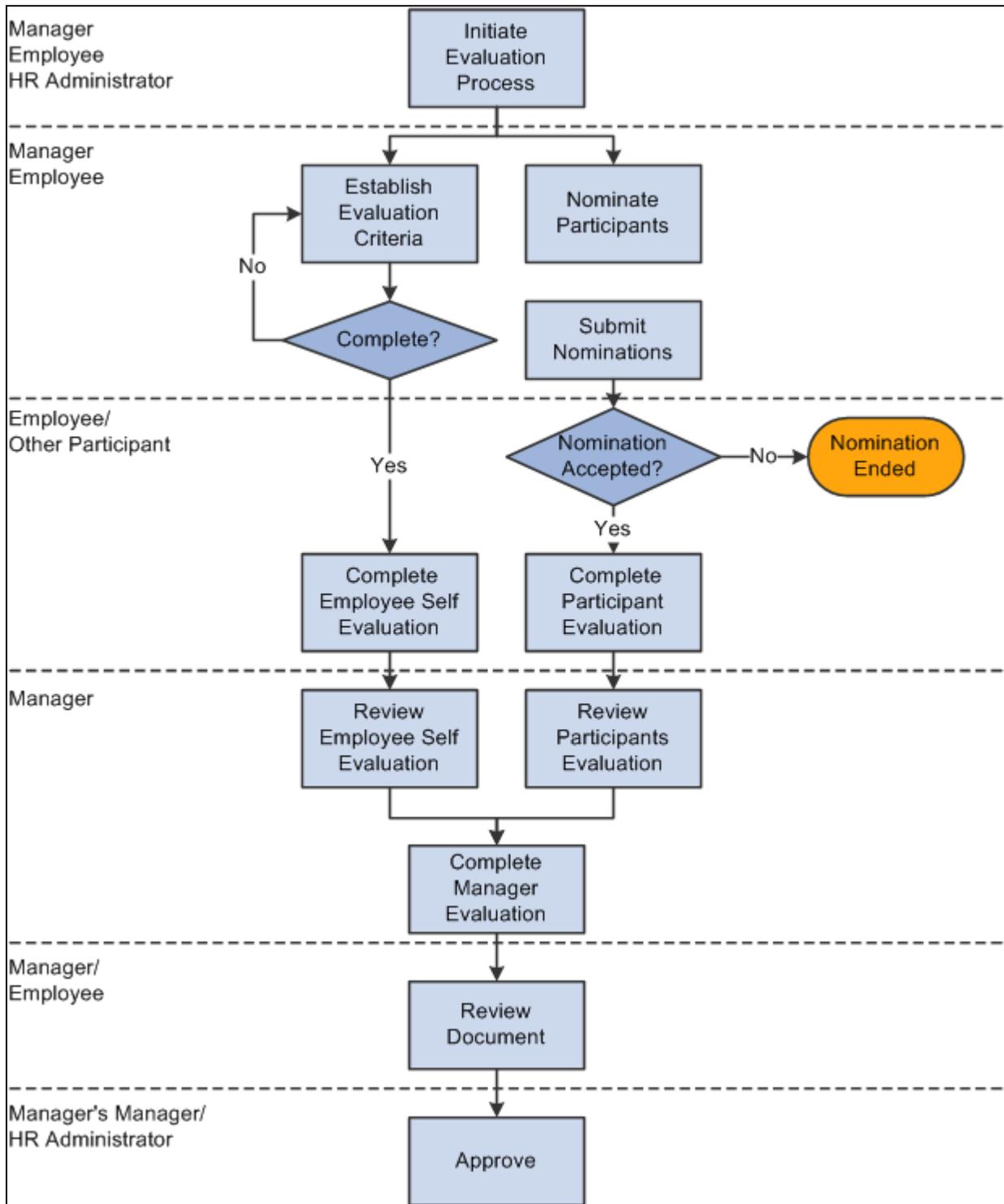
- Generate evaluations.
- Establish evaluation criteria.
- Manage multiple participants.
- Enter evaluation data, including notes, ratings, weights, and comments.
- Consolidate feedback from multiple sources into the manager/mentor's evaluation.

- Submit the manager/mentor evaluation for review and approval.
- Perform administrative tasks, such as transferring, reopening, canceling, and deleting documents.
- Enter preliminary ratings.
- Create and publish business objective pages.
- Cascade objective items down to individual performance documents.

---

## ePerformance Business Processes

This diagram illustrates the flow of ePerformance business processes — assuming that the document template implements the establish criteria, multi-participant, review, and approval processes.



ePerformance business process flow showing how a typical document moves through the system being evaluated, reviewed and approved by both managers and employees

The ePerformance business process includes these steps:

**Note.** Depending on how you configure the business process, some of these steps are optional.

1. The manager, employee, or HR administrator initiates the process by creating documents.

Employees can only create documents for themselves; managers can create documents for employees or groups that report to them; HR administrators can create documents for groups of employees.

See [Chapter 5, "Generating Documents," page 85.](#)

2. (Optional) The employee or manager modify the document's evaluation criteria and agree on the criteria that are established.

Criteria modifications include: adding free-form or predefined criteria, modifying the text of document criteria, or removing criteria. If integrating with Learning Management, you can add learning activity. Upon completion of this step, managers and employees can begin work on their evaluations.

See [Chapter 7, "Modifying Evaluation Criteria," page 127.](#)

3. (Optional) The employee or manager nominates participants to provide additional feedback.

See [Chapter 8, "Nominating and Tracking Multi-Source Participants," page 145.](#)

4. (Optional) After nominations are complete and the evaluation criteria are finalized, nominations are submitted to nominees by either the employee or manager.

When a nominee accepts a nomination, a participant evaluation is created for them.

5. Employees, managers, and (optionally) other participants complete their respective evaluations.

This step consists of rating evaluation items and entering comments.

See [Chapter 9, "Entering Comments and Ratings on Evaluations," page 159.](#)

6. The manager views average ratings and consolidates feedback into their evaluation.

During this step, the manager can optionally make use of several tools: notes that they entered pertaining to the evaluation; comments from other evaluators pertaining to the evaluation; development tips that are based upon competencies and sub-competencies; results writer statements that are based on competencies and sub-competencies; average consolidated ratings from other evaluators pertaining to the evaluation; and a language checker that checks language for objectionable terms.

See [Chapter 10, "Consolidating Feedback from Evaluators," page 183.](#)

---

**Note.** Depending on the document template definition, these tools are also available to employees and other participants. However, the manager makes primary use of these tools when completing an evaluation.

---

7. (Optional) The manager sends the evaluation to the employee for review.

8. (Optional) The manager submits the evaluation for approval.

See [Chapter 11, "Managing Reviews and Approvals," page 205.](#)

---

**Note.** Depending on the review and approval process that is defined in the document template, the final two steps might occur in reverse order.

---

### ***Administrative Processes***

These administrative processes occur on an as-needed basis and are outside of the evaluation processes:

- Transfer evaluations.
- Change evaluation status.
- Cancel evaluations.
- Delete evaluations.
- Enter preliminary ratings.
- View evaluation contents.

See [Chapter 12, "Performing Administrative Tasks," page 219.](#)

### ***Monitoring Evaluations***

HR administrators can monitor the status of evaluations and view a summary of the results with various reports and tools, including the following:

- Missing Documents report.
- Late Documents report.
- Status Summary chart.
- Rating Distribution Summary chart.

See [Chapter 13, "Using Inquiry Pages," page 271.](#)

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## **ePerformance Integrations**

Through integration with a broad suite of workforce performance and development applications, organizations can link performance evaluations and assessments to workforce plans, individual career plans, development, rewards, and reporting. ePerformance integrates with other PeopleSoft business solutions, as well as third-party integration by delivering both standard and generic integration points.

ePerformance integrates with these PeopleSoft applications:

- Human Resources - ePerformance documents use many of the common component tables to supply the basic data.
- Planning Salaries - The Merit Increase process uses data from the employee's performance document.
- Profile Manager - ePerformance uses the content catalog and profile types to supply content for performance and development documents. Evaluation criteria from the employee's performance document can update the employee's profile.
- Learning Management - ePerformance documents can have learning sections that display a list of learning relevant to the current performance evaluation period. Managers and employees can access Learning Management from a document to search for or add learning for the employee.

The implementation chapters of this PeopleBook discuss integration considerations.

**See Also**

[Appendix C, "Integrating with PeopleSoft Enterprise Learning Management," page 299](#)

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## ePerformance Implementation

Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

PeopleSoft also provides component interfaces to help you load data from your existing system into the Manage Profiles business process tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

**Other Sources of Information**

In the planning phase of an implementation, you can take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps.

**See Also**

*PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*

*Enterprise PeopleTools PeopleBook: PeopleSoft Setup Manager*

## Chapter 2

# Setting Up ePerformance

This chapter discusses how to:

- Define system settings.
- Work with Manage Profiles business process
- Work with approvals.
- Modify self-service pages and email notifications.

---

## Defining System Settings

To define system settings for ePerformance, use the General Settings (EP\_INSTALLATION) component.

This section provides an overview of system settings in ePerformance and discusses how to define system settings.

## Understanding System Settings

System settings control certain processing options. You can modify these delivered system settings to meet your business needs:

- Whether users can generate documents in languages other than the base language.
- Debug settings.
- Starting number for document ID generation.
- Fields that appear on the page from which users select documents.
- The email notifications that the system generates.

## Page Used to Define System Settings

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
ePerformance: General Settings	EP_INSTALLATION	Set Up HRMS, Install, Product and Country Specific, ePerformance: General Settings, General Settings	Define system settings.

## Defining System Settings

Access the General Settings page (Set Up HRMS, Install, Product and Country Specific, ePerformance: General Settings, ePerformance: General Settings).

ePerformance **Objective Pages**

Last Document ID:

**Debug Options**

Debug Rating Calculations

Allow Language Override

PS Audit Enabled

**Configure e-Mail Notifications**

- Manager document was created by HR (Recipient is Manager)
- Employee personal document was created (Recipient is Employee)
- Employee completed personal document (Recipient is Manager)
- Manager completed personal document (Recipient is Employee)
- Manager sent personal document back for rework (Recipient is Employee)
- Manager marked document available for review (Recipient is Employee)
- Manager requested acknowledgement of review (Recipient is Employee)
- Employee acknowledged review was held (Recipient is Manager)
- Due-date of document was changed (Recipient is Manager or Employee)
- HR reset status of Manager document (Recipient is Manager)
- Ownership of document was transferred (Recipient is new owner)
- Performance Criteria document was created (Recipient is Manager or Employee)
- Performance Criteria document was completed (Recipient is Manager or Employee)
- Performance Criteria document was reopened (Recipient is Manager or Employee)
- Employee adds/updates item on Evaluation Criteria document (Recipient is Manager)
- Manager adds/updates item on Evaluation Criteria document (Recipient is Employee)
- Nomination was submitted (Recipient is Nominee)
- Nomination was accepted (Recipient is Submitter)
- Nomination was declined (Recipient is Submitter)
- Nomination was canceled (Recipient is Nominee)
- Evaluation was canceled (Recipient is Reviewer ID)
- Document was canceled
- Other participant document was completed

ePerformance: General Settings page (1 of 2) page

**Configure Document Selection Page - Displayed Fields**

<input checked="" type="checkbox"/> Begin Date	<input checked="" type="checkbox"/> Manager Name
<input checked="" type="checkbox"/> End Date	<input checked="" type="checkbox"/> Job Title
<input checked="" type="checkbox"/> Document Status	<input type="checkbox"/> Employee ID

ePerformance: General Settings page (2 of 2) page

**Last Document ID**

Enter the number from which the system begins generating document IDs. The system automatically generates the document ID by adding 1 to the Last Document ID.

---

**Warning!** Entering a value that is lower than the value that appears can cause unpredictable results.

---

**Allow Document Language Override**

Select this check box to enable document generation in a language other than the system base language. If this check box is deselected, the system generates all documents in the system base language.

The base language is defined using the Manage Installed Languages page in PeopleTools.

**PS Audit Enabled**

Select this check box to enable Detailed Item History audits.

In addition to selecting this check box, you must also use Application Designer to turn on the audits that you want to use. Select the Audit fields in the Record Field Properties dialog box for the EP\_APPR\_B\_ITEM object.

When this audit is enabled, the system displays the Modification History link on document pages used for establishing criteria data. Users can click this link to access the Modification History page (EP\_ITEM\_MOD\_HISTRY), which displays before and after values by field name. The Detailed Item History audit is delivered turned off. This audit is controlled by a database trigger.

*See Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer Developer's Guide, Creating Record Definitions, Setting Record Field Properties, Setting Record Field Use Properties*

**Debug Options****Debug Rating Calculations**

Select this check box to have the system generate a debug/trace log every time it calculates the ratings in an evaluation. HR ePerformance administrators use the Debug/Trace Results page to review the results of each calculation performed for an evaluation.

This helps track down any unexpected results when you build templates and test the configuration.

---

**Warning!** Producing the debug/trace log can have a significant impact on system performance. Select this option only if you are testing the ePerformance configuration or debugging a suspected calculation problem.

---

**Configure Email Notifications**

Select the check box next to each event type for which you want the system to automatically generate and send notices.

### **Configure Document Selection Page - Displayed Fields**

Select the fields that you want to appear in the document list from which self service users select documents.

See [Chapter 5, "Generating Documents," Accessing Documents, page 104.](#)

---

## **Working with Manage Profiles**

This section provides overviews the rating models, content catalog, and profile types.

### **Using Rating Models**

ePerformance using rating models to rate an employee's performance or level of proficiency. Rating models define the qualitative values, such as A, B, and C, or 1, 2, and 3, that the system uses to rate or score and employee's performance.

Rating models are assigned to the sections that make up performance or development documents. Managers, employees, and peers can then select an appropriate rating that best reflects the employee's performance in that area.

Ratings can have expanded descriptions that can be used to further describe the behavior one exhibits when performing at a specific proficiency level. These expanded descriptions display on the performance or development document.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Setting Up the Content Catalog," Defining Rating Models.

### **Using the Content Catalog**

ePerformance uses content types and content items defined in the content catalog to identify the items by which employees are measured. Content types are used as categories for grouping similar content items. Content items are the specific items that you want to measure.

Content types are associated with the sections that form the structure of a document template and performance or development document. ePerformance uses content types to define the category of content items that can be added to document templates and performance documents.

This list includes some of the content types delivered and typically used by ePerformance:

- **MISSION**

Mission statements express an organization's purpose and vision. Typically, senior management defines and the board of directors or senior staff approve of an organization's mission statement. Business units might also establish mission statements to help guide the creation of initiatives, goals, and responsibilities. You can include one or more mission statements as items on performance documents, but more often, you'll include this on performance documents for informational purposes only.

- INITIATIVE

Initiatives are high-level plans, activities, or goals that support an organization's mission statement and define its direction. Initiatives usually guide the creation of goals and responsibilities. An organization may have multiple initiatives at any point in time.

- GOAL

Goals and objectives are specific results to accomplish. Typically, these statements describe a target that will be met or a condition that will exist when the desired outcome is accomplished.

- RESP

Responsibilities are usually based on job function. These are often broken down to specific tasks.

- COMPETENCY

Competencies are directly related to an employee's current role and may encompass skills, abilities, knowledge, or behavior, such as experience with office equipment, knowledge of special manufacturing processes, or a background in financial planning.

Once content types are defined, you can begin to link content items to content types.

This table provides examples of how content types and items in the Content Catalog for ePerformance might be set up:

<b>MISSION</b>	<b>INITIATIVE</b>	<b>GOAL</b>	<b>RESP</b>	<b>COMPETENCY</b>
<ul style="list-style-type: none"> <li>Leading supplier of paper products.</li> <li>Superior customer value.</li> <li>Renowned research university.</li> </ul>	<ul style="list-style-type: none"> <li>Increase shareholder value.</li> <li>Enhance customer productivity.</li> <li>Deliver innovative solutions.</li> </ul>	<ul style="list-style-type: none"> <li>Increase customer satisfaction by 10%.</li> <li>Increase cash reserves.</li> <li>Cut operational expenses by 3% by fiscal year end.</li> </ul>	<ul style="list-style-type: none"> <li>Participate in quarterly close process.</li> <li>Adhere to accounting standards.</li> <li>Prepare quarterly and annual financial reports.</li> </ul>	<ul style="list-style-type: none"> <li>Abstract thinking.</li> <li>Analytical thinking.</li> <li>Conceptual thinking.</li> </ul>

If you need to create new content types and content items, this table shows field mappings between Manage Profile and ePerformance:

<b><i>This field in Manage Profiles maps</i></b>	<b><i>To this field in ePerformance</i></b>
JPM_CAT_TYPE	EP_JPM_CAT_TYPE
JPM_CAT_ITEM_ID	EP_JPM_CAT_ITEM_ID
EFFDT	EFFDT
EFF_STATUS_DESCR	EFF_STATUS
JPM_DESCR90	EP_TITLE

<i>This field in Manage Profiles maps</i>	<i>To this field in ePerformance</i>
RATING_MODEL	RATING_MODEL
JPM_DATE_1	EP_ITEM_DUE_DT
JPM_DATE_2	EP_ITEM_REMIND_DT
JPM_TEXT1325_1	EP_DESCR254
JPM_TEXT1325_2	EP_MEASURE

---

**Note.** ePerformance enables you to associate sub-items to items. To accomplish this in the Manage Profiles business process you set up the relationship for the content item as a child of another content item.

---

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Setting Up the Content Catalog," Defining Content Items.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Setting Up the Content Catalog," Understanding Custom List Values.

## Using Profile Types

A profile type is a collection of content items that describe the qualitative attributes of a person or business entity. If a profile type is used to describe a person, it is called a person profile. If a profile type is used to describe a business entity, such as a job, business unit, or job family, it is referred to as a nonperson profile.

You can use profiles in ePerformance in these ways:

- To download content items from a nonperson profile into a document template.
- To download the content items from a nonperson profile into a performance or development document.
- To update or create an employee's person profile (ePerformance supports any person profile type for this purpose).

---

**Note.** ePerformance supports these nonperson profile identity options for downloading content items from a nonperson profile into a document template, performance document, or development document: Job Code, Job Family, Job Function, Position, Salary Plan and Grade, Reg Region, Company, Business Unit, and Location and Department.

---

When items are added to an ePerformance document from a Non-Person Profile, ePerformance downloads these fields from the Profile record:

<i>This field in a Non-Person Profile maps</i>	<i>To this field in ePerformance</i>	<i>Field Label in ePerformance</i>
JPM_CAT_ITEM_ID	EP_JPM_CAT_ITEM_ID	Item ID
RATING_MODEL	RATING_MODEL	Rating Model
JPM_RATING1	EP_TARGET_RATING	Target Rating

<b><i>This field in a Non-Person Profile maps</i></b>	<b><i>To this field in ePerformance</i></b>	<b><i>Field Label in ePerformance</i></b>
JPM_PCT_1	EP_WEIGHT	Weight
JPM_PCT_2	EP_MIN_WEIGHT	Min Weight
JPM_MANDATORY	EP_ITEM_MANDTRY_SW	Mandatory
JPM_YN_1	EP_ITEM_CRIT_SW	Critical
JPM_DATE_1	EP_ITEM_DUE_DT	Due Date
JPM_DATE_2	EP_ITEM_REMIND_DT	Reminder Date

These fields always come from the Content Catalog.

- JPM\_DESC90
- JPM\_TEXT\_1325\_1
- JPM\_TEXT\_1325\_2

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Managing Profiles."

---

## Working with Approvals and Reviews

ePerformance uses the Approval (PTAF\_TXN) component to define its approval processes. There are five approvals processes. Three processes use the new approval framework, which includes:

- ManagerOnly

This is a one-step approval process that routes the transaction to an approving manager.

- ManagerToAdmin

This is a two-step approval process that routes the transaction to an approving manager and then to the ePerformance human resources administrator.

- AdminOnly

This is a one-step approval process that routes the transaction to the ePerformance human resources administrator.

The approval process definition is linked to a document type using the Document Type page.

In addition to assigning the approval process definition to a document type, you also define when you want the employee review to occur within the performance process. Your choices are:

- Approval Before EE Review Held

The system follows one of the approval processes. The document is approved before the manager discusses it with the employee.

- Approval After EE Review Held

The system follows one of the approval processes. The document is approved after the manager discusses it with the employee.

- Approval. No EE Review Held

The system follows one of the approval processes. The manager does not review the document with the employee.

- No Approval. EE Review Held

The system does not follow an approval processes. The manager must review the document with the employee.

- No Approval. No EE Review Held

The system does not follow an approval processes and the manager does not review the document with the employee.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Approvals."

---

## Modifying Self-Service Pages and Email Notifications

This section list prerequisites for sending email notification and discusses:

- ePerformance text catalog settings.
- Text substitution.
- Notifications.

ePerformance provides standard text that appears on self-service pages and in automatically generated email notifications. The text catalog stores these text entries. You can modify the text catalog entries as needed or create new ones to meet business needs.

### **See Also**

*PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring the Text Catalog

## Prerequisites for Email Notifications

To ensure email and workflow notifications are working properly, complete the following steps:

1. Activate emails using the Worklist System Defaults page.
2. Define the method used to notify originator using the System Workflow Rules page.
3. Define user notification preferences.

4. Define user's email address on the Email Addresses page.
5. Select email user as a routing preference on the User Profiles - Workflow page.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Self-Service Transactions."

## ePerformance Text Catalog Settings

ePerformance makes use of the text catalog for storing text that appears on self-service pages, including field labels, button names, links, page instructions, and warnings as well as the text and subject lines of automated email notifications. You can modify text that appears on a page or in an email message by editing text in the Text Catalog feature.

The text catalog is partitioned by the applications that use it. Each partition can store and access data differently. To access the text catalog items that belong to ePerformance, enter HEP as the object owner identifier on the Maintain Text Catalog search page.

These are the unique settings that apply to ePerformance:

### **Sub ID**

ePerformance partitions its text catalog entries by performance and development. To retrieve text catalog entries, follow the instructions in this table:

<b>Document Type</b>	<b>Instruction</b>
Development	Enter <i>D</i> in the Sub ID field.
Performance	Leave the Sub ID field blank.

### **Text Catalog Keys**

ePerformance designates these four keys for storing and retrieving its entries:

<b>Section Type</b>	From the list of section types that you defined on the Section Definition page, select the section type to which the text pertains.
<b>Author Type</b>	From the list of role types that you defined on the Role Types page, select the evaluator role of the evaluation on which the text appears.
<b>User Role</b>	From the list of predefined system roles, select the system role to which the text pertains. This key is used to select text depending on the user's system privileges; for example, update or approve.
<b>Document Status</b>	Select the status to which the text pertains: <i>Acknowledged</i> , <i>Available for Review</i> , <i>Cancelled</i> , <i>Completed</i> , <i>In Progress</i> , <i>Not Started</i> , or <i>Review Held</i> .

When the system retrieves text from the catalog:

- Section type key takes precedence over author type
- Author type takes precedence over user role.
- User role takes precedence over document status.

---

**Note.** An empty key functions as a wildcard. Entries with wildcard keys pertain to all possible values for the key.

---

### **Example of Text Retrieval in ePerformance**

For example, if you define two different instructional messages for completing the Goals section of a document, one message for employees and an alternate version for managers, you would define the four keys as shown in this table:

<b>Text ID</b>	<b>Section Type (Key 1)</b>	<b>Author Type (Key 2)</b>	<b>User Role (Key 3)</b>	<b>Document Status (Key 4)</b>
Any ID	Goal	Blank	Employee	Blank
Any ID	Goal	Blank	Manager	Blank

First, the system looks for entries with an exact match on Key 1 (section type). If it finds entries that match the key value (including the wildcard entry), it searches only those entries for the other values and picks up the best match. In this case, the section type for both entries is Goal, so the system looks at Key 2 (author type). It applies the same logic. Both values in this case are wild cards, so both entries remain possibilities. Now, the system looks for a match on Key 3 (user role) and finds an exact match on Manager. The system only considers entries where Key 4 is blank if it cannot find any match on the key.

## **Text Substitution**

Text substitution in the Text Catalog feature works just like substitution in the PeopleTools Message Catalog. You supply the text values for the *tokens* in a PeopleCode function call at runtime. The values are replaced by parameters in the PeopleCode when the text is rendered on evaluations.

To use this feature, you must know PeopleCode. If you want to update the delivered text IDs such that the substitution tokens take on a different meaning or are resequenced, you also need to make corresponding changes to the PeopleCode that calls the Text Catalog feature retrieval functions, since this copies supplier values to use in place of the tokens.

These are the tokens and the substitution text for each token that are delivered by ePerformance. You can insert up to five substitution tokens from the following list:

- %1: The document type from the Document Type table (EP\_REVW\_TYP\_TBL).
- %2: The employee name formatted as first name, last name.
- %3: The employee ID.
- %4: The period begin date for the performance period.

- %5: The period end date for the performance period.
- %6: The due date of the evaluation.
- %7: The component link that transfers the user directly into the applicable evaluation.
- %8: The list of employees for whom an evaluation was successfully created during the background run.
- %9: The list of employees for whom evaluations were not created.
- %10: The Form-Create-Msg, which is one of two alternate messages that appear depending on the type of process that is run.

## Notifications

This table lists the delivered text entries that ePerformance includes in system-generated email notifications. It specifies when and to whom notices are sent. Most text entries have two versions, one with the suffix *\_SBJ* for use in email subject lines and a corresponding entry with the suffix *\_BDY* for use in the body of email messages. When a notification is triggered by a status change or an action request on an evaluation, the body text that is generated contains a link to the evaluation(s).

<b>Text Catalog ID</b>	<b>Recipient</b>	<b>Condition for Creating</b>
ADHOC_BASE_SBJ ADHOC_BASE_BDY	Manager or Employee	An adhoc message is sent from the criteria document.
ADHOC_MAIN_SBJ ADHOC_MAIN_BDY	Manager or Employee	An adhoc message is sent from an evaluation.
ADHOC_NOM_SBJ ADHOC_NOM_BDY	Multi-participant Evaluation Candidate	An adhoc message is sent from the Nominate Participants page for an evaluation.
BASE-COMplete_SBJ BASE-COMplete_BDY	Manager or Employee	An establish criteria document is marked as completed.
BASE-CREATE_SBJ BASE-CREATE_BDY	Manager or Employee	An establish criteria document is created by either the manager, employee or ePerformance HR Administrator.
BASE-REOPEN_SBJ BASE-REOPEN_BDY	Manager or Employee	An establish criteria document is reopened by either the manager or employee.
CHG-DUEDATE_SBJ CHG-DUEDATE_BDY	Manager, Employee or Multi-Participant Reviewer	A manager or ePerformance HR administrator changes the due date of an evaluation.
CHG-STATUS_SBJ CHG-STATUS_BDY	Manager, Employee or Multi-Participant Reviewer	An ePerformance HR administrator or manager resets the status of the evaluation to <i>In Progress</i> . This can happen if an evaluation is prematurely advanced to the next stage of the process.

<b>Text Catalog ID</b>	<b>Recipient</b>	<b>Condition for Creating</b>
CREATE-MGRDOC-SBJ CREATE-MGRDOC-BDY	Manager	An ePerformance HR administrator has generated documents using the batch process.
CREATE-ROLEDOC-SBJ CREATE-ROLEDOC-BDY	Employee	An ePerformance HR administrator has generated documents using the batch process.
DOC-CANCEL-SBJ DOC-CANCEL-BDY	Manager and Employee	An ePerformance HR Administrator or manager cancels the evaluation.
EE-ACKNOWLEDGE_SBJ EE-ACKNOWLEDGE_BDY	Manager	An employee acknowledges that they have reviewed the manager evaluation.
EMPDOC_COMPLT_SBJ EMPDOC_COMPLT_BDY	Manager	An employee marks the employee evaluation as completed.
EVAL_CANCEL_SBJ EVAL_CANCEL_BDY	Manager, Employee or Multi-Participant Reviewer	An ePerformance HR Administrator, manager or employee cancels an evaluation.
MGRDOC-COMPLT_SBJ MGRDOC-COMPLT_BDY	Employee	A manager marks the manager evaluation as completed.
NOM-ACCEPT_SBJ NOM-ACCEPT_BDY	Manager or Employee	A nominated employee accepts a nomination for a multi-participant evaluation.
NOM-CANCEL_SBJ NOM-CANCEL_BDY	Nominee	A nomination for a multi-participant evaluation is cancelled.
NOM-DECLINE_SBJ NOM-DECLINE_BDY	Manager or Employee	A nominated employee declines a nomination for a multi-participant evaluation.
NOM-SUBMIT_SBJ NOM-SUBMIT_BDY	Participants	Nominations to participate in multi-participant evaluations are sent to nominees.
OTHDOC-COMPLT_SBJ OTHDOC-COMPLT_BDY	Manager and/or employee	A participant in a multi-participant evaluation completes their evaluation.
RQST-ACK_SBJ RQST-ACK_BDY	Employee	A manager marks an evaluation as <i>Review Held</i> . This message is sent to the employee requesting that they formally acknowledge the evaluation.
RQST-REVIEW_SBJ RQST-REVIEW_BDY	Employee	A manager changes the status of a manager evaluation to <i>Available for Review</i> .

<b><i>Text Catalog ID</i></b>	<b><i>Recipient</i></b>	<b><i>Condition for Creating</i></b>
TRANSFER-MGR_SBJ TRANSFER-MGR_BDY	New Manager	A manager or ePerformance HR transfers an evaluation to a new manager.

These notification messages are used in email body text only.

MGR-FAIL-LIST_BDY	Manager	An HR administrator creates manager and employee documents, but some employee documents are not created. This message lists the employees for whom documents were not created.
DO-NOT-RESPOND_BDY	Manager and Employee	This is used in all notices.

## Chapter 3

# Setting Up Document Templates

This chapter provides an overview of document templates and discusses how to:

- Define document types.
- Define roles.
- Define sections.
- (JPN) Create review identifiers.
- Create document templates.

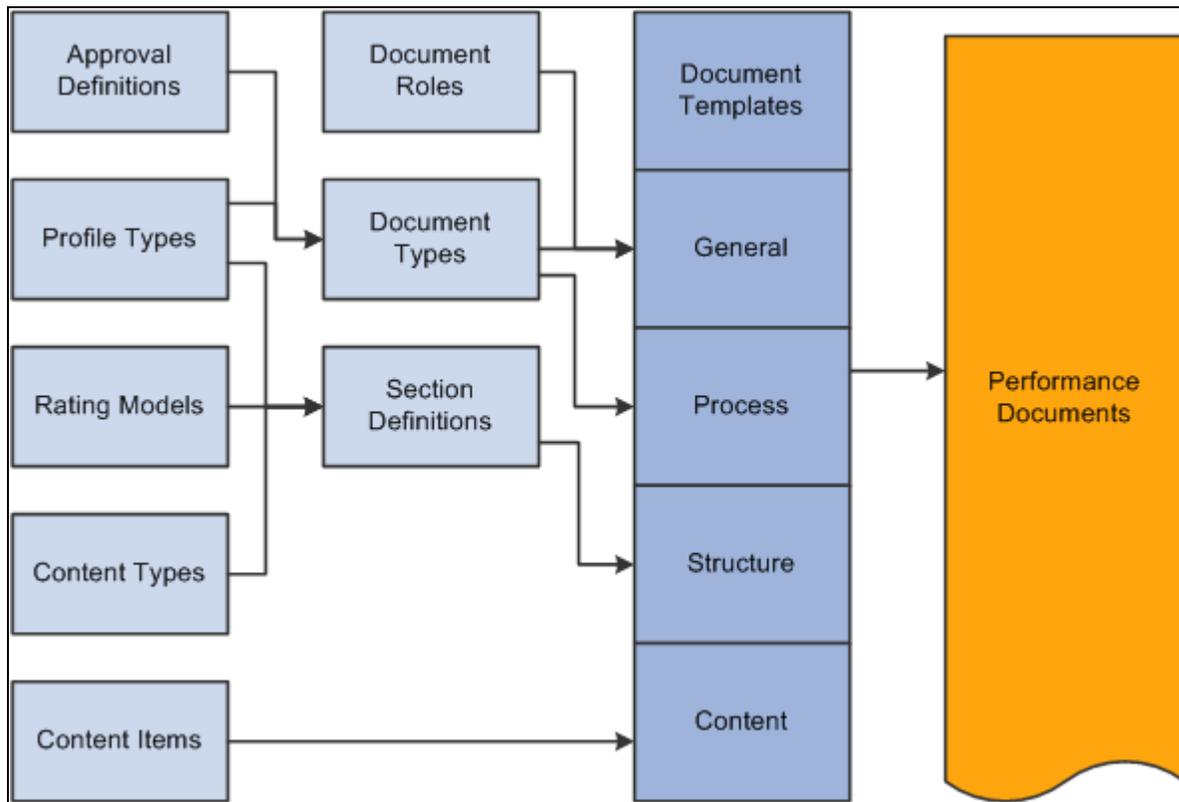
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## Understanding Document Templates

Document templates store information that is used to generate specific document instances for use by participants in the evaluation process. Options on the document template define:

- The roles that can participate in the review process.
- What activities each role can perform.
- The steps in the review process.
- The items that are evaluated.

The following diagrams shows the relationship between the core ePerformance tables, document templates, and generated performance documents.



Relationship between ePerformance tables between core ePerformance tables, document templates, and generated performance documents

The decisions you make and the options you select when you define templates influence the way the evaluation process is conducted in an organization. Organizations often define a high-level template and then successively clone and modify this template for the appropriate levels of the organization. For example, an organization might want a set of goals and initiatives for all employees. Each business unit clones this template with the common goals and initiatives and modifies it to add goals and initiatives that apply only to their business unit.

Before defining templates, consider:

- Which features are appropriate for the types of documents that are used in the organization.

For example, some organizations use documents to enhance communication between managers and employees, and do not assign ratings. Others assign a single overall rating, or rate each individual item (such as goals, responsibilities, or competencies) that is contained in the document.

- Ease of use and reuse when you design document templates.

Limiting the number of templates that you create for each document type makes it easier for users to select the correct template when they generate performance documents and simplifies template maintenance.

- Making the basic content in a template as generic as possible so that templates are flexible enough to meet the needs of large groups of employees.

You can then use job profiles to include job-specific competencies and responsibilities for all employees in a particular job, job family, position, or salary grade. By doing so, each employee's annual performance document has the same general appearance and instructions, but includes the competencies and responsibilities that are relevant to the particular job.

---

## Defining Document Types

To define document types, use the Document Types (EP\_REVIEW\_TYPE\_TBL) component.

This section provides an overview of document types and discusses how to set up document types.

## Understanding Document Types

Document types identify the types of documents that are valid for an organization, such as: Annual, Semi-Annual, Quarterly, Project, and Performance Improvement Plan. They are used to when you create document templates and provide default values for many fields on the template.

Document types also define whether:

- The document is used as the official review for integration with the Salary Planning component.
- Employees, managers, or both can generate documents.
- The document can be cloned.
- The user or the profile type identifies the document template.
- An approval process is used during the review process.

## Prerequisite for Setting Up Document Types

If you are planning to use profile types as the content source for your performance and development documents, define your profiles using the Manage Profiles business process before you create document types.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Managing Profiles."

## Page Used to Set Up Document Types

Page Name	Definition Name	Navigation	Usage
Document Types	EP_REVIEW_TYPE_TBL	Set Up HRMS, Product Related, ePerformance, Document Structure, Document Types, Document Types	Define document types.

## Defining Document Types

Access the Document Types page (Set Up HRMS, Product Related, ePerformance, Document Structure, Document Types, Document Types).

### Document Types

**Document Type:** KOANNUAL

Document Type Detail Find | View All | First 1 of 1 Last

**Effective Date:**   **\*Status:**

**\*Description:**

**Short Description:**   **Official Review**

**\*Document Usage:**

**Initiate Process:**  **Employee**  **Manager**  
 **Employee can Select Manager**

**Clone Existing Document:**  **Employee**  **Manager**

**Template Source:**  **User Specified**  
 **Profile Management**

**Profile Type:**

**Default Template:**

**Definition ID:**

**Objective Plan:**

Document Types page

**Official Review**

Select this check box to designate that documents generated for this document type are used by the Salary Planning by Group process to retrieve rating and review points and, by the Salary Increase Matrix page to retrieve ratings.

If an employee has more than one official document, these processes use the results of the document with the latest period ending date.

This selection becomes the default value for the Official Document field on the Template Definition page.

**Document Usage**

Select the process that uses the document type. Valid options are:

- *Performance*

Indicates that the system uses this document type for performance planning or evaluation.

- *Development*

Indicates that the system uses this document type for employee development.

Performance documents appear under the My Performance Documents menu on the Self-Service pages or under the Performance Documents menu on the Manager Self-Service and Administrator pages.

Development documents appear under the My Development Documents menu on the self-service pages or under the Development Documents menu on the Manager Self-Service and Administrator pages.

**Initiate Process**

Select *Employee, Manager*, or both check boxes to indicate which role or roles can initiate the evaluation process. The value that is in this field determines if the manager or employee can select the document type when initiating the evaluation process.

**Employee can Select Manager**

The system enables this check box only if you select the Employee check box for the Initiate Process field.

Select this check box to enable an employee to select the person who acts in the manager role during the evaluation process.

**Clone Existing Document**

Select *Employee, Manager*, or both check boxes to indicate which role or roles can clone an existing document to create a new document.

The system enables the employee and manager check boxes only if you select the corresponding check box in the Initiate Process field.

See [Chapter 5, "Generating Documents," page 85](#).

**Template Source**

Select the option that identifies where the system obtains the document template that will be used to generate documents. Values include:

- **User Specified**

Indicates that the user initiating the document creation process must identify the template.

- **Profile Management**

Indicates that the template comes from the Manage Profiles business process.

**Profile Type**

The system enables this field if you select the *Profile Management* option in the Template Source field.

Select the profile type that is used by the Create Documents process to identify the document template. The list contains only nonperson profile types that have the ePerformance template association option included as a related object in the Profile Association Options group box on the Profile Types - Associations page.

**Default Template**

The system enables this field if you select the Profile Management option in the Template Source field. The Create Documents process uses the profile type and the employee's job data to determine the employee's nonperson profile and obtain the ePerformance template associated with that profile.

Select the template that is used to generate the documents for this document type when the system cannot identify a template for the given profile type.

---

**Note.** Because document types are defined before templates, return to the Document Type page after you define the default template and enter the value for this field.

---

**Definition ID**

Select the approval definition for documents of this type. Values include:

- *ManagerOnly*

This is a one-step approval process that routes the transaction to an approving manager.

- *ManagerToAdmin*

This is a two-step approval process that routes the transaction to an approving manager and then to the ePerformance HR Administrator.

- *AdminOnly*

This is a one-step approval process that routes the transaction to the ePerformance HR Administrator.

The definition ID determines the chain of approvals a document must go through, if any, when a manager clicks the Submit button on an document. The value that you select here becomes the default value for the Definition ID field on the Template Definition page for templates of the document type.

**Objective Plan** Select the objective plan that you want associated with the document type you are defining. The objective plan is used to align and copy items from business objectives to performance documents.

**See Also**

[Chapter 11, "Managing Reviews and Approvals," page 205](#)

[Chapter 3, "Setting Up Document Templates," page 21](#)

## Defining Roles

To define roles, use the Document Roles (EP\_ROLE\_TBL) component.

This section provides an overview on roles and discusses how to set up roles that can provide multi-participant feedback.

## Understanding Roles

ePerformance enables you to include feedback from participants other than the employee and the employee's manager (for example, peers or customers). To implement multi-participant feedback processes, you must first define the roles that can participate in the process. After the roles are defined, you can add them to a document template definition that is used in the multi-participant process.

## Page Used to Define Roles

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Participant Roles	EP_ROLE_TBL	Set Up HRMS, Product Related, ePerformance, Document Structure, Participant Roles, Participant Roles	Set up roles.

## Setting Up Participant Roles

Access the Participant Role page (Set Up HRMS, Product Related, ePerformance, Document Structure, Participant Roles, Participant Roles).

**Participant Roles**

Role ID: PEER

**Role Details** Find | View All First 1 of 1 Last

\*Effective Date: 01/01/1900 \*Status: Active

Description: Peer

Long Description: Peer Role

Participant Roles page

ePerformance delivers the Manager and Employee roles as system data. Other roles that are available as sample data are: Customer, Peer, and Other.

---

**Note.** You cannot modify, inactivate, or delete the Manager or Employee roles. They are required data.

---

### See Also

[Chapter 3, "Setting Up Document Templates," page 21](#)

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## Defining Sections

To create document sections, use the Section Definition (EP\_SECTION\_DEFN) component.

This section provides an overview of document sections and discusses how to:

- Define sections.
- Define content groups.

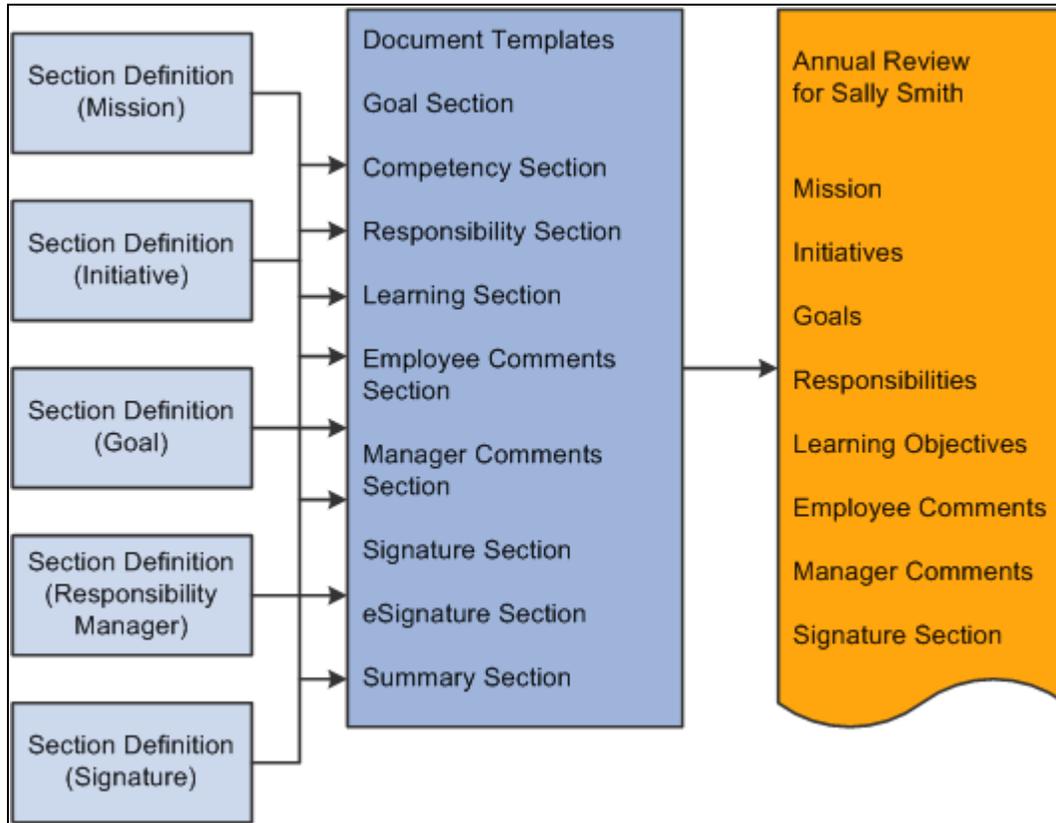
## Understanding Document Sections

Sections are another building block for document templates. They form the structure of a performance or development document. For example, your organization may want its performance evaluations to include:

- The organization's mission statement.
- The department's initiative for meeting the mission statement.
- The employee's goals.
- The employee's competencies, responsibilities, or learning.

- A section for employee's to add comments.
- A section for manager's to add comments.
- A section for signatures.

Each of these are separate section definitions that can be added to the document template. The following diagram illustrates the relationship between sections, templates, and generated documents.



Definition relationships chart showing the relationships between sections, templates, and generated documents

When you define sections, you specify:

- Whether the section is rated or weighted.
- Which calculation method to use to determine employee ratings.
- Which rating model to use to rate employees.
- Any special processing for that section.
- What category of content types are associated with the section.
- What information to include in the document.

ePerformance delivers the following section definitions:

- Competency (competency)

- Employee (employee comments)
- Goals
- Init (initiatives)
- Learning
- Manager (manager comments)
- Mission
- Resp (responsibility)
- Sign (signature)
- eSignature (This is a system delivered section that can be used to electronically record the date the employee acknowledges the document and the date the manager completes or finalizes the document)
- Summary (overall summary)

### ***Ratings and Weighting***

You may want to rate some sections, such as employee responsibilities or competencies. You, however, may not want to rate others section, such as mission statements. You may want to weight the sections that are rated higher than others. Weighting a section or item in the section enables you to place more or less importance on the section or item.

### ***Calculation Methods***

If your organization rates employee performance, you can have the system calculate the employee's performance rating or enter the ratings manually. ePerformance delivers three different calculation methods:

- *Average*

To use this method, the rating models that are associated with the section and its items must define numeric ratings that correspond to the rating descriptions. The system uses the numeric ratings to calculate a weighted average if weights exist; otherwise, it calculates a straight average. It then converts this average back to a performance document rating using the rating model again.

- *Summation*

To use this method, the rating models that are associated with the section and its items must define review points. The rating model for the section must also define point ranges (from points and to points). The system converts ratings to review points as defined in the rating model, calculates the total review points, and converts this total into the corresponding review rating for the section by using the point range on the rating model. Weights are ignored. Item ratings are not used in the summation method.

- *Review Band*

This method is similar to the Summation method, but is only available for the Overall Summary section of a document. To use this method, the rating model that is associated with the Overall Summary section must include a performance document band and define review points as well as point ranges (from points and to points). During the calculation process, the system computes the total review points across all sections and converts this total into the equivalent rating on the document band.

## Special Processing

Special processing determines the use of a section and the fields that are enabled in the Section, Items, and Sub-Items group boxes on the Section Definition page. ePerformance provides the following type of special processing.

<b><i>If Special Processing is</i></b>	<b><i>Then the section</i></b>
Business Objectives	Can be connected to a section on a business objective page to allow objectives to be aligned and copied between the two.
Employee Comments	Cannot be rated nor weighted. Cannot have items nor subitems.
Learning	Can be rated and weighted. Cannot have items nor subitems.
Manager Comments	Cannot be rated nor weighted. Cannot have items nor subitems.
None	Can be rated and weighted. Can have items and subitems.
Overall Summary	Can be rated and weighted. Cannot have items nor subitems.
Signatures	Cannot be rated nor weighted. Cannot have items nor subitems.
eSignatures	Records the date and time that the employee acknowledged the review. Records the date and time that the manager completed the review.

## Prerequisites for Creating Section Definitions

Before you can create sections, you must complete the following:

1. Define rating models.
2. Define content types.
3. (Optional) Define profile types.

When competencies and responsibilities vary between jobs, you can use job profiles to generate the performance criteria associated with a section. This might be easier than creating a separate template for each job. Job profiles can be attached to job codes, job families, salary grades, and positions. That means that anyone associated with the same job code, job family, salary grade, or position will have the same content downloaded into their performance document.

## Pages Used to Create Section Definitions

Page Name	Definition Name	Navigation	Usage
Section Definition	EP_SECTION_DEFN	Set Up HRMS, Product Related, ePerformance, Document Structure, Section Definition, Section Definition	Define sections.
Define Content Group	EP_CONTENT_SEC	Click the Define Content Group link on the Section Definition page.	Select both a content group type and a content group. Selecting a content group type and content group determine what sections appear on the Template Definition page. This information is set up in the content catalog.

## Defining Sections

Access the Section Definition page (Set Up HRMS, Product Related, ePerformance, Document Structure, Section Definition, Section Definition).

### Section Definition

**Section Type:**      COMPETCY

**Section Definition Detail** Find | View All First 1 of 1 Last

**Effective Date:** 01/01/1900 [calendar icon]      **\*Status:** Active + -

**\*Description:**

**Section**

**Rate**      **Calculation Method:**

**Preliminary Rating**      **Rating Model:**

**Weight**      **Rating Display:** Drop-Down Box

**Minimum Weight:**       **Weight:**

**\*Special Processing:**

Section Definition page (1 of 2) page

Items		
<input checked="" type="checkbox"/> Enable Items	Content Type:	Competencies
<input type="checkbox"/> Free-Form Allowed		<a href="#">Define Content Group</a>
<input type="checkbox"/> Rate	Prompt Table:	EP_J_CAT_ITEM_I
<input type="checkbox"/> Use Section Rating Model		
<input type="checkbox"/> Weight		<input type="checkbox"/> Target Rating
<input checked="" type="checkbox"/> Mandatory		<input type="checkbox"/> Minimum Weight
<input checked="" type="checkbox"/> Description		<input checked="" type="checkbox"/> Critical
<input type="checkbox"/> Due Date		<input type="checkbox"/> Measures
<input type="checkbox"/> Ownership		<input type="checkbox"/> Reminder Date
<input type="checkbox"/> Percentage Completed		<input type="checkbox"/> Stretch Goal
<input type="checkbox"/> Level of Difficulty		
<input type="checkbox"/> Supports	Link:	
<input type="checkbox"/> Status	User Defined Value:	
<input type="checkbox"/> Empl Measures		<input type="checkbox"/> Private - hide from employees
<input type="checkbox"/> Start Date		<input type="checkbox"/> End Date
Sub-Items		
<input checked="" type="checkbox"/> Enable Sub-Items	Prompt Table:	EP_J_CAT_SUB_I
<input type="checkbox"/> Free-Form Allowed	Content Type:	Sub-Competencies
<input checked="" type="checkbox"/> Description		
Profile Management		
<input checked="" type="checkbox"/> Initialize from Profile	Profile Type:	Job

Section Definition page (2 of 2) page

Enter the information that you want to use later to populate the fields on the Template Definition - Structure page for the specified section. The descriptions you enter here are used to identify the sections that you want to add on the Template Definition page.

### Section

#### Rate

Select this check box to enable a rating assignment for the section, either by a system calculation or manually. A rating field appears in the section summary of a document.

The system enables this check box if *Learning*, *None*, or *Overall Summary* is selected in the Special Processing field.

<b>Calculation Method</b>	<p>Select the calculation method used for the section. Values include:</p> <ul style="list-style-type: none"> <li>• <i>Average</i></li> <li>• <i>Summation</i></li> <li>• <i>Review Band</i></li> </ul> <p>The system enables this field if the Rate check box is selected and the Special Processing field is set to <i>Learning</i>, <i>None</i>, or <i>Overall Section</i>.</p>
<b>Preliminary Rating</b>	<p>Select this check box to enable a manager to enter a preliminary rating for the performance document.</p> <p>The system enables this check box if the Rate check box is selected and the Special Processing field is set to <i>Overall Summary</i>.</p>
<b>Rating Model</b>	<p>Select the default rating model for the section.</p> <p>The system enables this field if the Rate check box is selected and the Special Processing field is set to <i>Learning</i>, <i>None</i>, or <i>Overall Summary</i>.</p>
<b>Weight</b>	<p>Select this check box to enable the section to have a weighting relative to the other sections in the document. A Weight Section field appears in the section summary.</p> <p>The system enables this check box if the Rate check box is selected and the Special Processing field is set to <i>Learning</i> or <i>None</i>.</p> <p>You cannot weight sections of a performance document when you select a calculation method of <i>Summation</i> or <i>Review Band</i> for the Overall Summary section and you elect to have the system calculate performance ratings. (You enter calculation instructions through the Template Definition component.)</p>
<b>Rating Display</b>	<p>Select one of these values to indicate how you want the system to display the rating options:</p> <ul style="list-style-type: none"> <li>• <i>Drop-Down Box</i></li> <li>• <i>Radio Buttons</i></li> </ul>
<b>Minimum Weight</b>	<p>Enter the minimum weight for the section. This field is used when ratings are calculated to ensure that the section weight cannot fall below a minimum value.</p> <p>The system enables this check box if the Weight check box is selected.</p>
<b>Weight</b>	<p>Enter the default weight for a section. The system enables this check box if the Weight check box is selected.</p>

## Special Processing

This field determines the type of information that is entered in this section and how the system processes the information.

- *Business Objectives* – Select this option if this section if you want users to connect this section to a section on a business objective page to allow objectives to be aligned and copied between the two.
- *Employee Comments* – Select this option if this section is used by employees to enter and edit comments on the manager's performance evaluation when the evaluation status is *Available for Review*, *Review Held*, or *Acknowledged*.

This type of special processing allows the employee to enter their comments regarding the manager's assessment of the employees performance on the Manager Evaluation.

When selected, all fields on this page become unavailable.

- *Learning* – Select this option if this section is used by employees and managers to add or view learning information from Learning Management. The system only enables the Rate and Weight check boxes.

---

**Note.** The XMLP report includes the Learning section.

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- *Manager Comments* – Select this option if this section is used by managers to enter comments, in response to the employee's comments, on the performance evaluation when the evaluation status is *In Progress*, *Available for Review*, *Review Held*, or *Acknowledged*. When selected, all fields on this page become unavailable.
- *None* – Select this option if no special processing options apply. Most likely, you'll select this option when creating a section for a mission statement, initiatives, goals and objectives, competencies, or responsibilities.
- *Overall Summary* – Select this option if this section contains the overall rating for the document. A document template can include only one section that is set to *Overall Summary*. When selected, all fields on this page except the Rate Section and Summary fields become unavailable.
- *Signatures* – Select this option if a predefined signature section appears on the printed version of the evaluation. This section consists of two signature rows: the first for the employee, the second for the manager. Each row includes a signature line and a date. To change the format of the signature lines in this section, modify the Text Catalog feature.

When selected, all fields on the page except the Summary field become unavailable.

---

**Note.** The Text Catalog entry for defining the signature format is APPR\_MAIN1\_INST2 for evaluations and APPR\_BASE\_SEC\_DESC for the Establish Criteria document. The section type context key for both equals SIGN.

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- *eSignatures* – Select this option if you want the system to record the date and time that the employee acknowledged the review and the date and time that the manager completed the review. When a document is viewed or printed using XML publisher the system displays the signature section with the employees name printed on the employee signature line along with the date and time the employee acknowledged the document. In addition the manager's name is printed on the manager signature line with the date and time the manager completed the document.
- *Business Objectives* – Select this option to allow items from this section to be aligned to business objectives.

### **Items**

The fields in this group box are available if the Special Processing field is set to *None*. The fields displayed here determine if the section on the document can contain content items such as mission statements, initiatives, goals or objectives, competencies, responsibilities, or free-form items. A section must contain all items of the same content type. Items are evaluated or tracked depending on the rules that you specify. Typically, Employee Comments, Manager Comments, Overall Summary and Signatures sections do not include content items.

#### **Enable Items**

Select this check box if the section can contain items. When you select this check box, the system enables you to select the other fields in this page.

The system only enables this check box if the Special Processing field is set to *None*.

The system displays the items you select on the Establish Criteria and Document pages, on the Template Definition - Content page, and on Performance or Development documents.

---

**Note.** If you select the Critical check box, all check boxes and fields within the items group box will have a critical indicator.

---

#### **Content Type**

Select the content type from which content items (job attributes) are pulled when defining the criteria used to evaluate employee performance on the Template Definition - Content page. Valid options are any content types defined in the content catalog in the Manage Profiles business process. This field cannot be a content type that is defined only as a child of another content type.

#### **Free-Form Allowed**

Select to enable users to add free-form items to this section of a document or template. For example, managers might use this feature to add a list of courses that an employee should take. The system assigns an item sequence ID to each free-form item that is added. These items are not stored for reuse.

<b>Define Content Group</b>	<p>Click this link to access the Define Content Group page (EP_CONTENT_SEC) where you can select both a content group type and a content group. Selecting a content group type and content group determine what sections will appear on the Template Definition page. This information is set up in the content catalog.</p> <p>See <i>PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles</i>, "Setting Up the Content Catalog."</p>
<b>Rate</b>	<p>Select this check box to enable a rating assignment for the section, either by a system calculation or manually. The Rating Model field appears on the Template Definition - Content page and a rating field appears in the section summary on the performance document.</p>
<b>Prompt Table</b>	<p>Select the name of the table that holds the content items that you want included in the section.</p>
<b>Use Section Rating Model</b>	<p>Select this check box to have the rating model for all items and subitems on the document template default to the section rating model.</p> <p>The system enables this check box if a rating model is entered in the Rating Model field in the Section group box.</p>
<b>Weight</b>	<p>Select this check box to enable the item in the section to have a weighting relative to the other items in the section. A weight section field appears in the section summary.</p> <p>You cannot weight sections of a performance document when you select a calculation method of <i>Summation</i> or <i>Review Band</i> for the Overall Summary section and you elect to have the system calculate performance ratings. (You enter calculation instructions through the Template Definition component.)</p> <p>The system enables this check box if the Rate check box is selected.</p>
<b>Target Rating</b>	<p>Select this check box to indicate that content items can have a target proficiency rating assigned on the Template Definition - Content page. The target proficiency rating displays on the performance document for the content items. The system enables this check box if the Rate check box is also selected.</p> <hr/> <p><b>Note.</b> The target rating is used with the learning integration feature. If the employee doesn't make his or her target rating, the system sends the person's performance rating to ELM. ELM will then do a fit gap analysis, suggest a learning for the employee, and add a learning course to the learning grid.</p> <hr/>
<b>Mandatory</b>	<p>Select this check box if the document author cannot edit or delete items. This applies to all items, regardless of whether they are defined on the template or job profile.</p>
<b>Minimum Weight</b>	<p>Select this check box if items can have a minimum weighting. Minimum weights are entered on the Template Definition - Structure page.</p> <p>During the evaluation process, managers can click an update link on the evaluation to edit the minimum weight.</p>

<b>Description</b>	Select this check box to display the Description field on the Template Definition - Content page and on the Performance or Development Document. When an item from the Content Catalog is added, the system displays the description associated with that item and it cannot be edited. If the item is manually added, you can edit the Description field unless the item is marked as mandatory on the Template Definition - Content page.
<b>Critical</b>	Select this check box to indicate that all check boxes and fields within the items group box can have a critical indicator.
<b>Due Date</b>	Select this check box to have items include a due date on the document. For example, managers might enter a due date by which an employee must become proficient in a certain competency or attain a particular goal. During the evaluation process, managers can update the due date.
<b>Measures</b>	Measurements describe the standards against which performance is compared. When an item from the Content Catalog is added, the system displays the measurement associated with that item and it cannot be edited. If the item is manually added, you can edit the Measurement field.
<b>Ownership</b>	Select this check box to have items contain the Owner field, which indicates who is responsible for the item: the employee or the manager. The flag is informational only; it does not cause any special processing to occur. During the evaluation process, managers can click an update link on the evaluation to edit the Owner field.
<b>Reminder Date</b>	Select this check box if items can contain a reminder date on the document. During the evaluation process, managers can click an update link on the evaluation to edit the reminder date.
<b>Percentage Completed</b>	Select this check box if items on a document can include a field for entry of the percentage complete. Employees and managers can use this field to indicate progress towards certain goals.
<b>Stretch Goal</b>	Select this check box to allow items on a document to be flagged as being a stretch goal. This field is for informational purposes only.
<b>Level Of Difficulty</b>	Select this check box to display the Level Of Difficulty field. The Level of Difficulty field includes <i>Basic</i> , <i>Intermediate</i> and <i>Advanced</i> as its values. You can associate these values with the difficulty of an item. When an item from the Content Catalog is added, this field displays the level of difficulty associated with that item and you cannot edit the values. If the item is manually added, you can select the level of difficulty unless the item is marked mandatory on the Template Definition - Content page.

- Align Items and Links To** If you select *Business Objectives* in the Special Processing field, the system displays the Align Items and Links To fields.
- Select the Align Items check box to align items in this section with business objectives. This field works in conjunction with the Links To field.
- Select *Any Section* in the Links To drop down list box. On the performance document the system enables a user to associate a business objective to a specific item and displays the Alignment Chain icon, which a user can click to view how the objective they selected aligns with other higher level objectives. The system only enables this check box if the Align Items check box is selected.
- Supports and Link** If you do not select *Business Objectives* in the Special Processing field, the system displays the Supports and Link fields.
- Select the Supports check box to enable the association of items in this section with items in a different section of the same review. This field works in conjunction with the Link field.
- Similar to cascading objectives, the Link option enables you to indicate that the current section supports another section. This association displays an informational message on the performance document. The system enables this check box if the Supports check box is selected.
- Status and User Defined Value** Select this check box to have items in the section of a document include a field that identifies the status of the item. Possible statuses are *Complete*, *In Progress*, and *N/A (Not Applicable)*.
- The values that are available for selection in the User Defined Value field are defined using the Custom List Values component in the Content Catalog (select Set Up HRMS, Product Related, Profile Management, Content Catalog, Custom List Values).
- Empl Measures** Select this check box if you want the system to display an Employee Measurement field for the section. An employee or manager can use this field to describe how the item they are defining should be measured.
- Private - hide from employees** Select this check box if you do not want employees or other managers to view information in this section.
- When a user is adding an item to their performance document and selects the Copy from Manager's Document option, the system does not display the item.
- Start Date** Select this check box if you want to enable managers or employees to set start dates for the items they are defining in this section.
- End Date** Select this check box if you want to enable managers or employees to end start dates for the items they are defining in this section.
- Sub-Items**
- The system enables fields in this group if the Enable Items check box in the Items group box is selected.

<b>Enable Sub-Items</b>	Select this check box to indicate that the section can contain subitems. Subitems are typically sub-competencies that are created through the Competency function.
<b>Prompt Table</b>	Select the name of the table that holds the subitems that are included in the section.
<b>Free-Form Allowed</b>	Select this check box to enable users to add free-form (non-coded) subitems to this section.
<b>Content Type</b>	<p>Select the content type from which content items will be selected. The content types available for selection are those that are associated with the value you selected in the Content Type field in the Items section. Content types are set up under a content group type in the content catalog.</p> <p>The Content Type and Content Group Type fields are used for search when adding a predefined competency to the evaluation criteria specified on the document template.</p>
<b>Description</b>	Select this check box to have the description for the subitem appear on the evaluation. During the evaluation process, managers can click an update link on the evaluation to edit the description for the subitem.

### ***Profile Management***

This group box is used to identify whether you want to download criteria from a nonperson profile.

<b>Initialize from Profile</b>	<p>Select this check box if you want the competencies or responsibilities that are associated with a profile type automatically loaded from the profile into the template or document.</p> <p>The system enables this field only when the Special Processing field is set to <i>None</i>.</p>
<b>Profile Type</b>	<p>Select the profile type. These profile types are defined in the Manage Profiles business process with a profile equal to the <i>Job, Role, Cluster, and Syndication</i>.</p> <p>The system enables this field if you select the Initialize from Profile check box. A role can be tied to person profile in the Evaluation Role Rules grid.</p>

## **Defining Content Groups**

Access the Define Content Group page (Click the Define Content Group link on the Section Definition page).

Select the content group type and content group. The content group type and content group determine what sections will appear on the Template Definition page. This information is set up in the content catalog.

## (JPN) Creating Review Identifiers

To create review identifiers, use the Review Definition table JPN (REV\_DEF\_TBL\_JPN) component.

This section provides an overview of review identifiers (IDs) and discusses how to create review definitions.

### Understanding Review Identifiers

Review IDs associate document types with setIDs. In some organizations, the document types and the performance periods that one business unit uses can differ from those in another business unit. You also define whether the performance results are considered by the Grade Advance Candidate JPN and by any of the salary increase processes of the Plan Salaries business process for Japan.

When you create a document template, you can designate that the documents generated from the template are used for official reviews. This is required if you want to use the Manage Base Compensation and Budgeting business process. Pages in this business process locate employee review results by locating the document ID that is linked to the template that was used to create the employee review document.

#### See Also

[Chapter 3, "Setting Up Document Templates," page 21](#)

### Page Used to Create Review Identifiers

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Define Review JPN	REV_DEF_TBL_JPN	Set Up HRMS, Product Related, ePerformance, Define Review JPN, Define Review JPN	Define reviews. This includes performance period, document type, and inclusion of the review when determining eligibility for grade advances.

### Defining Reviews

Access the Define Review JPN page (Set Up HRMS, Product Related, ePerformance, Define Review JPN, Define Review JPN).

<b>Define Review JPN</b>	
Set ID:	JPN01
Review ID:	FY2009
*Description:	Salary Review for FY 2009
Short Description:	Salary 2009
Period Begin Date:	01/01/2009 
Period End Date:	12/31/2009 
*Document Type:	KOANNUAL 
	<input type="checkbox"/> Include in Grade Advance

Define Review JPN page

**Period Begin Date and Period End Date**

Enter the first and last dates of the performance period. This information is informational only.

See [Chapter 3, "Setting Up Document Templates," Defining General Template Information, page 49.](#)

**Document Type**

Select the document type that is valid for the selected setID.

**Include in Grade Advance**

Select this check box to include this review when you run the JPN Grade Advance Candidate (PER062JP) SQR report.

To run the JPN Grade Advance Candidate report, you define the criteria employees must meet before they are eligible for a grade advancement, including the number of eligibility points they must earn on evaluations.

For example, you can have the system take an average or weighted average of the eligibility points for the employee's last three evaluations. When you run the Grade Advance Candidate process, the system looks at the number of eligibility points the employee earned on this and other designated or applicable evaluations.

If the eligibility points meet the required threshold, the employee is eligible for a grade advancement.

This field works with the eligibility points that are defined for the rating model that the system references when calculating the performance results (the Overall Summary section of the document).

**See Also**

*PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting, "Administering Salary Plans, Grades, and Steps," (JPN) Setting Grade Advance Criteria*

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## Creating Document Templates

To create document templates, use the Template Definition (EP\_TMPL\_DEFN) component.

This section discusses how to:

- Define general template information.
- Define document processes.
- Add sections to documents.
- Add criteria to sections.
- Load content from profiles.
- Clone templates.

## Understanding Document Template Set Up

Document templates are defined using these four pages:

- General
- Process
- Structure
- Content

### ***General Page***

The General page defines processing options. It also enables you to activate steps in the business process. Using roles you can define which type of employees can participate in the performance or development process. You can also designate that documents using this template are recognized by the system as the official review.

By selecting Official Review, you indicate that the overall rating from the manager's document generated with this template is to be used to update salary planning information.

By selecting Establish Criteria, you activate an additional step in the business process. Establish Evaluation Criteria appears as the first step to be completed on the Document Details page. The system also creates the Performance Criteria - Draft document, which allows the manager, employee or both to update and possibly add items to the performance criteria document.

By selecting Nominate Participants, you activate another group of steps in the business process. Nominate Participants, Track Nominations, and Review Participant Evaluations appear as steps on the Document Details page. The system also creates documents for each person that accepts their nomination.

See [Chapter 3, "Setting Up Document Templates," Defining General Template Information, page 49.](#)

### ***Process Page***

The Process page shows the processes that are required to complete the document based on the choices you made on the General page. You select the actions that each role or roles can perform for each process. You also specify:

- Whether the ratings that are entered by persons having that role are anonymous.
- Approval rules for the manager's document.
- Overall document processing rules.

See [Chapter 3, "Setting Up Document Templates," Defining Document Processes, page 52.](#)

### ***Structure Page***

The Structure page defines the sections that are included on documents. You select one or more sections to include in the document. The section definition is copied into the document template. After the section definition is copied, you can override any of the section settings.

For each section that you include in the document, you can specify how the document roles interact with that section, the actions that different roles can perform, the content that is visible to managers and employees, and the writing tools that managers and employees can use to enter ratings and comments.

You can add multiple sections that require ratings. These sections can be any content type defined in the Manage Profile business process; such as goals, objectives, and competencies sections. Sections can also be defined to pull content from nonperson profiles created in the Manage Profile business process.

Each section may have different calculation methods. Because you can add sections that have different calculation methods, the following table illustrates how the calculation method that you select for the overall rating (the Overall Summary section) determines which calculation methods the other sections of the document can use and whether the calculation method permits section weighting:

<b>Calculation Method for Overall Summary Section</b>	<b>Calculation Methods Allowed for Other Sections</b>	<b>Section Weighting Allowed?</b>	<b>Rating Calculations</b>
Average	Average	Yes	<p>To determine item ratings, the user enters the item rating. If subitems exist, the system calculates the item rating by taking the average of the subitems.</p> <p>To determine section ratings, for sections other than Overall Summary, the system checks if there are items that are rated. If there are no other rated items, the user enters the section ratings. If there are rated items, the system determines if any of the items are weighted.</p> <p>If there are weighted items, the system calculates the rating as a weighted average of all of the item ratings in the section, taking individual item weights into account. Unrated items and items that are not weighted are ignored.</p> <p>If there are <i>no</i> weighted items, the system calculates the simple average of all rated items. Unrated items are ignored.</p> <p>To determine overall ratings, the system checks to see if there are other sections that are rated. If there are no other rated sections, the user enters the section rating.</p> <p>If there are rated sections, the system determines if the sections are weighted. If there are weighted sections, the system calculates the rating as a weighted average of all of the section ratings in the document, taking individual section weights into account. Unrated items and items that are not weighted are ignored.</p> <p>If there are no weighted sections, the system calculates the simple average of all rated items.</p>

<b>Calculation Method for Overall Summary Section</b>	<b>Calculation Methods Allowed for Other Sections</b>	<b>Section Weighting Allowed?</b>	<b>Rating Calculations</b>
Summation	<p>Average and Summation</p> <p>You must define review points in addition to numeric ratings for these sections. The system converts section ratings to review points to determine the overall rating.</p>	No	<p>To determine section ratings, for sections other than the Overall Summary section, the system determines the rating and corresponding review points for each item in the section. Only items with review points are considered. It sums the points to determine the total points for the section.</p> <p>To determine overall ratings, the system determines the calculation method for the other sections.</p> <p>If the section rating is calculated using the average method, the system converts the section rating to the appropriate number of review points entered for that section, using the rating model associated with the section.</p> <p>If the section rating is calculated using the summation method, the total review points for the section are used as the section points. The points from each section are summed and converted to a document rating using the from and to point range on the rating model that is used for the Overall Summary section.</p>
Review Band	<p>Average and Summation</p> <p>You must define review points in addition to numeric ratings for these sections. The system converts section ratings to review points to determine the overall rating.</p>	No	<p>The review band is only available for the Overall Summary sections. To use this method, the rating model that is associated with the Overall Summary section must include a performance document band and define review points as well as point ranges (from points and to points). The system uses the points in its calculations and:</p> <ol style="list-style-type: none"> <li>1. Calculates the overall points by following the same steps as the summation method.</li> <li>2. Converts the overall points into the appropriate review band according to the rules you define on the Rating Model page.</li> </ol>

See [Chapter 3, "Setting Up Document Templates," Defining Sections, page 28.](#)

**Content Page**

The Content page defines the specific job attributes or content items by which an employee is to be measured. Only those sections that were included on the Structure page are available on the Content page.

Criteria on the Content page can come from three sources:

- Content Catalog

Items and sub-items from the Content Items Detail (JPM\_CAT\_ITEMS) table. The system adds the Content Type field to the Load Content From Profile (EP\_TMPL\_DEFN5) page to narrow down the search.

---

**Note.** You can define unique coded categories of performance criteria. To do so, use Application Designer to create tables that store the items for the new criteria type. The tables that you create are then referenced as prompt tables in document templates and evaluations. Include the following fields in the table that you define: EP\_ITEM\_ID (key), EP\_TITLE, EFFDT (optional key), EFF\_STATUS (optional), EP\_DESCR254 (optional)

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- Free-Form Items

Free-form items are criteria that are not stored in the EP\_APPR\_ITEM, EP\_APPR\_B\_ITEM, EP\_TMPL\_ITEM tables. Free-form items enable you to fine-tune evaluations to an individual employee or a small group of employees. You can add free-form criteria to the templates you use to create performance documents. You can also enable managers, employees, or both types of workers to add free-form assessment items after the performance document is generated.

- Download from the nonperson profile.

Items and sub-items can be added from nonperson profile defined in the Manage Profiles business process. The system uses the specified profile type to identify content and automatically adds it to the Template Definition - Content page.

The criteria defined on the Template Definition - Content page are automatically pulled into the document that is generated using the specified template.

## Prerequisites for Creating Document Templates

Before you create templates, complete the following tasks:

- Set up the content catalog.
- (Optional) Define job profiles.
- Set up rating models.
- Define document types.
- Define document roles.
- Define section definitions.
- (JPN) Create Review Identifiers.

---

**Note.** You cannot create a template without a document type. In addition, a template must contain at least one section with a manager role selected.

---

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Setting Up the Content Catalog."

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Managing Profiles."

See [Chapter 3, "Setting Up Document Templates," Defining Document Types, page 23.](#)

See [Chapter 3, "Setting Up Document Templates," Defining Roles, page 27.](#)

## Pages Used to Create Document Templates

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Template Definition - General	EP_TMPL_DEFN1	Set Up HRMS, Product Related, ePerformance, Document Structure, Template Definition, General	Define general template information. The information that you specify on this page controls the sections that are available on other pages of the component.
Template Definition - Process	EP_TMPL_DEFN2	Set Up HRMS, Product Related, ePerformance, Document Structure, Template Definition, Process	Define document processes. The information that you specify here determines the functions that employees, managers, and other participants can perform in each step of the review process.
Template Definition - Structure	EP_TMPL_DEFN3	Set Up HRMS, Product Related, ePerformance, Document Structure, Template Definition, Structure	Define document structure, add appropriate sections to the template, define override default section settings, and define the way each role interacts with the document section.
Template Definition - Content	EP_TMPL_DEFN4	Set Up HRMS, Product Related, ePerformance, Document Structure, Template Definition, Content	Add criteria to sections.
Load Content From Profile	EP_TMPL_DEFN5	Click the Load Content from Profile link on the Template Definition - Content page.	Load content from profiles. Profiles can be used to load criteria into sections.
Clone Template Definition	EP_CLONE_TMPL	Set Up HRMS, Product Related, ePerformance, Document Structure, Clone Template Definition, Clone Template Definition	Clone templates.

## Defining General Template Information

Access the Template Definition - General page (Set Up HRMS, Product Related, ePerformance, Document Structure, Template Definition, General).

The screenshot displays the 'General' tab of the Template Definition page. It includes the following information:

- Document Type:** PERFORM Performance Document
- Template ID:** K0PERF
- Effective Date:** 01/01/1980
- \*Description:** Performance Multi-Rater
- \*Status:** Active
- Official Review
- Establish Criteria
- Nominate Participants

The **Participation** section contains a table with the following data:

*Role	Evaluation	Document Due Days	Period Type		
Other	<input checked="" type="checkbox"/>	30	After Period End Date	+	-
Peer	<input checked="" type="checkbox"/>	30	After Period End Date	+	-
Employee	<input checked="" type="checkbox"/>	30	After Period End Date	+	-
Manager	<input checked="" type="checkbox"/>	60	After Period End Date	+	-

Template Definition - General page

### Description

Enter a description of the document template.

This description appears as a selection field when users create evaluations from the template. Therefore, each template within a document type should have a unique description.

### Official Review

Select this check box to designate that the overall rating from the manager's documents generated with this template is to be used to update salary planning information.

If an employee has more than one official document, these processes use the results of the document with the latest period end date. The default value from the Document Type page appears here, but you can change it.

<b>Establish Criteria</b>	<p>Select this check box to enable the Establish Criteria step.</p> <p>When you select this check box, the Establish Criteria group box appears on the Process page and as a step on the Document Detail page. The default value from the Document Type page appears here, but you can change it.</p> <p>In addition, when this check box is selected, the system displays the Establish Criteria - Role Rules grid on the Structure tab; otherwise the grid is hidden.</p>
<b>Nominate Participants</b>	<p>Select this check box to enable the Nominate Participants step.</p> <p>When you select this check box, the Nominate Participants and Review Participant Feedback group boxes appear on the Process page. The default value from the Document Type page appears here, but you can change it.</p>
<b>Participants Tab</b>	
<b>Role</b>	<p>Select one or more roles that can participate in evaluations that are generated using this document template.</p> <p>The manager and employee roles always appear in this list. You can add additional roles that you defined on the Roles page.</p>
<b>Evaluation</b>	<p>Select this check box to have the system create an evaluation for the role. The check box for the manager role is always selected and cannot be altered.</p>
<b>Document Due Days</b>	<p>Enter the number of days that the document is due before or after the period end date.</p> <p>Documents always pertain to a specific period of time, defined by the period begin and period end dates. These dates are established when the document is created.</p> <p>The document due date appears on the Employee Performance pagelet that managers can use to monitor pending performance documents (if you have PeopleSoft Portal Pack).</p> <p>The due date is also used to generate the Late Reviews (EP_LATE_APPR) report and to run the Create Summary Data (EP_RPT_SNAP) process. Managers can use the Change Due Dates page to change the due date of the employee's document. HR administrators can use the same page to modify the due date of the manager's document.</p>
<b>Period Type</b>	<p>Select one of these values to indicate the period in which the number of days you entered should apply:</p> <ul style="list-style-type: none"> <li>• <i>Before Period End Date</i></li> <li>• <i>After Period End Date</i></li> </ul>

---

**Note.** If you entered 0 in the Document Due Days field, leave this field blank.

---

### **Evaluation Document Header Tab**

If the Evaluation Document Header fields are selected, the system displays the information in the document header for persons that are assigned the manager's role.

<b>Empl ID</b> (employee ID)	Select this check box to display the employee's ID in the document header.
<b>Step</b>	Select this check box to display the employee's step ID and description in the document header. You can locate the value for this field on the Salary Plan page.
<b>Grade</b>	Select this check box to display the employee's grade ID and description in the document header. You can locate the value for this field on the Salary Plan page.
<b>Dept ID</b> (department ID)	Select this check box to display the employee's department number and description in the document header. You can locate the value for this field on the Work Location page in Job Data component.
<b>Work Loc</b> (work location)	Select this check box to display the employee's location ID and name in the document header. You can locate the value for this field on the Work Location page in Job Data component.
<b>Yrs of Service</b> (years of service)	Select this check box to display the employee's years of service in the document header. When calculating years of service for this page, the system uses the current system date or the period end date.

---

**Note.** If you access or print this document after the review period or the service period has ended, it reflects the service that was relevant as of the last day of the performance period. If you access or print this document prior to the period end date, it reflects the employee's service as of the current date.

---

<b>Time Entry</b>	Not used at this time.
<b>Rating History</b>	Select this check box to display a link in the document header that takes the user to the Rating History page. The Rating History page displays the review period and the overall rating for the document type on the template. Additionally, the system can display the number of overall ratings based upon the date range or number of rows requested.

---

**Note.** The Step, Grade, Department ID, and Work Location fields come from the Job table for the job code for which the document was created. The system selects the maximum effective-dated job record less than or equal to the period end date on the document.

---

### **See Also**

[Chapter 4, "Setting Up Text for Advisor Tools," page 71](#)

[Chapter 5, "Generating Documents," Viewing Document Progress Details, page 107](#)

## Defining Document Processes

Access the Template Definition - Process page (Set Up HRMS, Product Related, ePerformance, Document Structure, Template Definition, Process).

General
Process
Structure
Content

**Document Type:**      PERFORM Performance Document

**Template ID:**        K0PERF      **Effective Date:**      01/01/1980

**Establish Criteria**

**Updated By:**       Employee                       Manager

**Completed By:**      Manager ▼

**Due Date:**        0                      **Days:**      After Period End Date ▼

**Nominate Participants**

**Updated By:**       Employee                       Manager

**Submitted By:**      Manager ▼

**Tracked By:**         Employee                       Manager

**Due Date:**        10                      **Days:**      After Period End Date ▼

**Data**

Role	Minimum Required	Maximum Required	Anonymity for Employee	Anonymity for Manager
Other	<input style="width: 40px;" type="text" value="0"/>	<input style="width: 40px;" type="text" value="5"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Peer	<input style="width: 40px;" type="text" value="3"/>	<input style="width: 40px;" type="text" value="5"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Review Participant Evaluations**

**Accessed By:**       Employee       Manager

**Viewed By:**         Employee       Manager

**Anonymity**

Role	Anonymity for Employee	Anonymity for Manager	Display Names in Mgr Doc
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Peer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Template Definition - Process page (1 of 2) page

Manager Evaluation	
*Review Process:	No Approval, EE Review Held <input type="button" value="v"/>
Definition ID:	<input type="text"/> <input type="button" value="🔍"/>
View Average Rating:	<input checked="" type="checkbox"/> Manager <input type="checkbox"/> Employee
	<input checked="" type="checkbox"/> Cancel Outstanding Evaluations
Attachments:	<input type="checkbox"/> Allow Attachments
Evaluation Rules	
*Rounding Rule:	Standard <input type="button" value="v"/> Decimal Places: <input type="text" value="0"/>
	<input type="checkbox"/> Calculate Ratings *Map Method: <input type="button" value="v"/>
	<input type="checkbox"/> Language Checker
<input type="button" value="v"/> <input type="checkbox"/>  Japan	
Review ID:	<input type="text"/> <input type="button" value="🔍"/>
	<input type="checkbox"/> Include in Grade Advance

Template Definition - Process page (2 of 2) page

---

**Note.** The page shown here is for a performance document. Pages for other document types may display different fields and sections.

---

### ***Establish Criteria***

Use the fields in this section to establish the criteria by which the document will be updated and completed. You can also use the Due Date and Days fields to establish a time period for when the document is due for completion.

### ***Nominate Participants***

Use the fields in this section to establish who can update and submit the names of people that should participate in the review. The system also allows you to indicate who can track the process.

You can also use the Due Date and Days fields to establish a time period for when the evaluation is due for completion.

The Data group box allows you to enter the minimum and maximum number of participants (Other and Peer) that are required. You can also use the Anonymity for Employee and Anonymity for Manager check boxes to indicate if the name of the manager or employee nominating the participant should be anonymous to the participants (Other and Peer).

### ***Review Participant Evaluations***

Use the fields in this section to establish who can access and view the names of people that are participating in the evaluation. The Anonymity group box allows you to indicate if the participants reviewing the evaluation (Other and Peer) should be anonymous to the employee, manager or both.

**Display Names in Mgr Doc** (display names in manager document)

Select this check box if the employees' names should be displayed as Other Participants on the manager's document. The system enables this check box only when the Anonymity for Manager check box is deselected for the role. If the role is anonymous to the manager, then the system does not display the names on the manager document.

**Manager Evaluation****Review Process**

(Optional) Select the sequence by which the review is completed.

This field identifies the process for reviewing a document with the employee, and when this review takes place relative to a formal approval of the document. It also controls when the Submit, Complete, Available for Review, and Review Held actions are available to the manager.

Options are:

- *Approval After EE Review Held:* Select if the document approval occurs after the manager reviews the completed document with the employee.
- *Approval Before EE Review Held:* Select if the approval must occur before the manager reviews the completed document with the employee.
- *Approval, No EE Review Held:* Select if an approval process is required, but the manager does not need to review the document with the employee.
- *No Approval, EE Review Held:* Select if the manager reviews the completed document with the employee, but no approval process applies.
- *No Approval, No EE Review Held:* Select if neither an approval process nor a review of the completed document is required.

See [Chapter 11, "Managing Reviews and Approvals," page 205](#).

**Definition ID**

Select the approval definition that determines the chain of approvals a document must go through when the manager clicks the Submit button on the performance document.

The default value selected on the Document Type page appears here, but you can change it. This field applies only if the Review Process field is set to *Approval After EE Review Held*, *Approval Before EE Review Held*, or *Approval, No EE Review Held*.

Valid options are:

- *ManagerOnly*

This is a one-step approval process that routes the transaction to an approving manager.

- *ManagerToAdmin*

This is a two-step approval process that routes the transaction to an approving manager and then to the ePerformance HR Administrator.

- *AdminOnly*

This is a one-step approval process that routes the transaction to the ePerformance HR Administrator.

**View Average Rating**

If you want to view a graphical representation of the ratings on the document for the manager or employee, select one or both check boxes.

**Cancel Outstanding Evaluations**

Select this check box to automatically cancel evaluations that are not completed and nominations that are not accepted when the manager evaluation moves past the *In Progress* status. This option prevents late evaluations from coming in and altering the average ratings.

**Allow Attachments**

This check box enables you to turn on the attachment capability for manager documents. When you select this check box, the system adds a new section to the bottom of the manager document, which allows the manager to attach documents when the evaluation is in the *In Progress* status.

---

**Note.** This attachment section is visible to anyone that has access to the manager document. However, only the document owner (manager) can add attachments to the document. The manager has the ability to add and delete one or more attachments when the manager document status is *In Progress*. Once the document moves passed the *In Progress* stage or is cancelled, the system does not allow attachments to be added.

---

**Evaluation Rules**

The fields in this page region define rules for calculating ratings that apply to the document as a whole.

<b>Rounding Rule</b>	Specify how the system should round calculated ratings whenever the system uses the Average calculation method. Values are <i>Down</i> , <i>Standard</i> , and <i>Up</i> . With standard rounding, the system rounds up on 5 and rounds down on 4. For example, 2.5 rounds to 3, while 2.4 rounds down to 2. This works in combination with the number of decimal places the system rounds to. For one decimal place, 2.45 rounds to 2.5, while 2.44 rounds to 2.4.
<b>Decimal Places</b>	If you select a rounding rule, enter the number of decimal places for rounding. No more than two decimal places are allowed.
<b>Calculate Ratings</b>	Select this check box if you want the system to automatically performs all roll-up calculations to calculate an overall summary rating. This feature is the default, and causes a Calculate button to appear on the evaluations. To have evaluators manually enter all ratings, deselect this check box.
<b>Map Method</b>	<p>If the Calculate Ratings check box is selected, select how the system should map numeric ratings to qualitative ratings when there is no exact match after the rounding rule is applied. For example, the calculated rating 2.7 falls between numeric ratings defined on the Rating Model Table page as 1, 2, 3, and 4; the mapping method defines the numeric rating to map to the value 2.7.</p> <p>Options are <i>Highest</i>, <i>Lowest</i>, and <i>Nearest</i>.</p> <p>For example, assume the rating model has the following entries:</p> <p>A = Superior (numeric rating = 1)  B = Good (numeric rating = 2)  C = Average (numeric rating = 3)  D = Needs improvement (numeric rating = 4)</p> <p>If the system calculates a rating of 2.7 (between Good and Average, but closer to Average), the mapping method tells the system which entry to pick:</p> <ul style="list-style-type: none"> <li>• <i>Highest</i> yields the next numerically highest rating—in this case 3, or Average.</li> <li>• <i>Lowest</i> yields the next numerically lowest rating—in this case 2, or Good.</li> <li>• <i>Nearest</i> yields the numerically closest rating—in this case 3, or Average.</li> </ul> <p>If the calculated rating falls exactly halfway between two ratings in the rating model, the system assigns the numerically higher of the two ratings.</p>
<b>Language Checker</b>	Select this check box to enable the use of the Language Checker tool when entering comments. Users can click a button on the document to have the system check for inappropriate language in the Comments and Results text boxes on the evaluation.
<b>(JPN) Review ID</b>	To enable the (JPN) Salary Planning process by review ID, select the ID. You define IDs on the Review Definition Table JPN page. You can only select documents defined for the selected document type.

**(JPN) Include in Grade Advance** (applicable for grade advance) Select this check box if the selected review ID is eligible for the Grade Advance feature of the Plan Salaries business process. It is selected automatically if the Include in Grade Advance check box is selected on the JPN Review Definition Table page.

### See Also

[Chapter 7, "Modifying Evaluation Criteria," page 127](#)

[Chapter 8, "Nominating and Tracking Multi-Source Participants," page 145](#)

[Chapter 9, "Entering Comments and Ratings on Evaluations," page 159](#)

[Chapter 10, "Consolidating Feedback from Evaluators," page 183](#)

[Chapter 11, "Managing Reviews and Approvals," page 205](#)

## Adding Sections to Documents

Access the Template Definition - Structure page (Set Up HRMS, Product Related, ePerformance, Document Structure, Template Definition, Structure).

The screenshot displays the 'Structure' tab of the 'Template Definition - Structure' page. At the top, there are four tabs: 'General', 'Process', 'Structure' (selected), and 'Content'. Below the tabs, the following information is shown:

- Document Type:** PERFORM Performance Document
- Template ID:** K0PERF
- Effective Date:** 01/01/1980

The main section is titled 'Sections' and includes a search bar with 'Find | View All' and navigation controls for '1 of 3' sections. The current section is 'Goals Section' with a display order of 10. Below this, a 'Section' configuration panel is visible with the following settings:

- Rate
- Preliminary Rating
- Weight
- Calculation Method:** Average
- Rating Model:** PSCM
- Rating Display:** Drop-Down Box
- Minimum Weight:** 0
- Weight:** 0
- \*Special Processing:** Business Objectives

Template Definition - Structure page (1 of 3) page

Items		
<input checked="" type="checkbox"/> Enable Items	Content Type:	Goals and Objectives
<input checked="" type="checkbox"/> Free-Form Allowed		
<input checked="" type="checkbox"/> Rate	Prompt Table:	EP_J_CAT_ITEM_I
<input type="checkbox"/> Use Section Rating Model		
<input type="checkbox"/> Weight		<input type="checkbox"/> Target Rating
<input type="checkbox"/> Mandatory		<input type="checkbox"/> Minimum Weight
<input checked="" type="checkbox"/> Description		<input type="checkbox"/> Critical
<input checked="" type="checkbox"/> Due Date		<input type="checkbox"/> Measures
<input type="checkbox"/> Ownership		<input type="checkbox"/> Reminder Date
<input checked="" type="checkbox"/> Percentage Completed		<input checked="" type="checkbox"/> Stretch Goal
<input type="checkbox"/> Level of Difficulty		
<input checked="" type="checkbox"/> Align Items	Links to:	Any Section
<input checked="" type="checkbox"/> Status	User Defined Value:	OBJECTIVE STATUS
<input checked="" type="checkbox"/> Empl Measures		<input checked="" type="checkbox"/> Private - hide from employees
<input checked="" type="checkbox"/> Start Date		<input checked="" type="checkbox"/> End Date
Sub-Items		
<input type="checkbox"/> Enable Sub-Items	Prompt Table:	
<input type="checkbox"/> Free-Form Allowed	Content Type:	
<input type="checkbox"/> Description		
Profile Management		
<input type="checkbox"/> Initialize from Profile	Profile Type:	

Template Definition - Structure page (2 of 3) page

Establish Criteria - Role Rules								
Role ID	Add Items	Update Items	Delete Items	Copy Objective Items	Copy Manager's Items			
Employee	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

Evaluation - Role Rules								
Rate/Weight   Section   Item   Edit   Profile Management								
*Role	Rate Section	Rate Item	Rate Sub-Item	Override Rating	Numeric Rating	Weight Section	Weight Item	
Employee	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Template Definition - Structure page (3 of 3) page

**Note.** Most of the fields on this page are similar to the Section Definition page.

See [Chapter 3, "Setting Up Document Templates," Defining Sections, page 28.](#)

### Section

Select a section to include in the documents that are generated from this template.

The sections available for selection are those that were previously defined using the Section Definition page. When you select a section, the information defined for that section becomes the default information for this section on the Structure page. You can override any default value.

**Note.** You can include only one Overall Summary section on each template.

### Display Order

Enter a unique sequence number to specify the relative order in which this section appears in the document. The default value for the first section is 10. The system increments the value for subsequent sections by ten. If, for example, you override a sequence number to 25, the system assigns 35 as the next sequence number.

**Note.** If you enter sequence numbers out of order, the system automatically reorders them when you exit the Template Definition component and reopen it.

### **Sections, Section, Items, Sub-Items, and Profile Management**

The fields that appear in these group boxes default to the values you defined for this section on the Section Definition page. You can override these values.

See [Chapter 3, "Setting Up Document Templates," Defining Sections, page 28.](#)

### ***Establish Criteria - Role Rules***

Use the fields in this section to define how managers and employees can view and update the evaluation document. Select the appropriate check boxes to grant the manager or employee permission to add items, update items, delete items, copy objective items, or copy manager's items on the evaluation document when it's created.

<b>Add Items</b>	Select this check box to enable the role to add items to this section in the Establish Criteria document. If the role can add items, they can also update and delete items that they add.
<b>Update Items</b>	Select this check box to enable the role to update items in this section on the Establish Criteria document that were added by a source other than themselves; for example, the manager, the profile, or the template. In addition, if the item was cascaded down to the document, they can also update it.
<b>Delete Items</b>	Select this check box to enable the role to delete items in the Establish Criteria document that were added by a source other than themselves; for example, the manager, the profile, or the template. In addition, if the item was cascaded down to the document, they can also delete it.
<b>Copy Objective Items</b>	Select this check box to enable the role to copy business objective items into the documents that are generated for the role.
<b>Copy Manager's Items</b>	Select this check box to enable the role to copy items from the manager's document into the documents that are generated for the role.

---

**Note.** The system does not display this section for all document types.

---

### ***Evaluation - Role Rules***

This section has five tabs that you can use to define how managers and employees can use different fields on the document you are creating to evaluate themselves or an employee.

Here are the five tabs:

- Rate/Weight
- Section
- Item
- Edit
- Profile Management

#### ***Rate/Weight Tab***

**Role** Select the role for which you are defining rules.

<b>Rate Section</b>	Select this check box to enable the author to assign a section rating. This field is available if Rate is selected for the section.
<b>Rate Item</b>	Select this check box to enable the author to rate items in this section. This field is enabled if Rate is selected in the Items page region for the section.
<b>Rate Sub-Item</b>	Select this check box to enable the author to rate sub-items in this section. This field is enabled if Rate is selected in the Items page region for the section.
<b>Override Rating</b>	Select this check box to have an Override Rating button appear next to the Calculate button on the evaluation. The author can click this button to modify the calculated rating.  This option is enabled when the Calculate Ratings check box is selected on the Template Definition page.
<hr/>	
<b><i>Warning!</i></b> Do not use this feature with the Summation calculation method.	
<hr/>	
<b>Numeric Rating</b>	Select this check box to have the evaluation display both the rating and the numeric equivalent or points of the rating that you define on the Rating Model Definition page.  This option is enabled if Rate is selected for the section.
<b>Weight Section</b>	Select this check box to enable the author to assign a section weighting. This option is enabled if Weight Section is selected for the section.
<b>Weight Item</b>	Select this check box to enable the author to weight items in this section. This option is enabled if Weight Section is selected for the section.
<b><i>Section Tab</i></b>	
<b>Comments</b>	Select this check box to have the section contain an area for users to add a free-form description of the employee's performance on the section. If you do not select this check box for a role, the other selections for the role are not available.
<b>View Other</b>	Select this check box to enable the role to view the sections from other completed evaluations that are part of this document. This option is available to managers only.

## Results Writer

Select an option to have text suggestions from the Results Writer tool appear on the Suggested Results page when the user clicks the Writing Tools link on an evaluation.

Results Writer suggestions are predefined statements that describe the employee's proficiency level for the associated item. The Results Writer tool is designed primarily for competency and sub-competency sections of an evaluation; however, you can enable this feature for other sections of an evaluation as well.

This field is enabled only if the Comments check box is selected for the role

The available options are:

- *Competency*

Select to list the Results Writer statements that are associated with competencies. You associate statements with competencies on the Competency Proficiencies - Results Writer page.

- *Sub-Competency*

Select to list the Results Writer statements that are associated with sub-competencies. You associate statements with sub-competencies on the Sub-Competency Proficiencies - Results Writer page.

- *Not Used*

Select if you do not want Results Writer suggestions to appear on the Suggested Results page.

**Development Tips**

Select an option to have text suggestions from the Development Tips tool appear on the Suggested Results page when the user clicks the Writing Tools link on an evaluation.

Development tips are predefined statements that suggest how employees can improve proficiency at the associated item and are designed primarily for competency and sub-competency sections of an evaluation. However, you can enable this feature for other sections of an evaluation as well.

This field is enabled only if the Comments check box is selected for the role

The available options are:

- *Competency*

Select to list development tips that are associated with competencies. You associate development tips with competencies on the Competency Proficiencies - Development Tips page.

- *Sub-Competency*

Select to list development tips that are associated with sub-competencies. You associate development tips with competencies on the Sub-Competency - Development Tips page.

- *Not Used*

Select if you do not want development tips to appear on the Suggested Results page.

**Other Evaluator Comments**

Select this check box to have comments that were entered by other evaluators appear on the Suggested Results page for the role. Only comments from completed evaluations that were entered for the same summary section appear on the list.

This field is enabled only if the Comments check box is selected and the role is manager.

**Notes**

Select this check box to have performance notes that the employee or manager entered during the Establish Criteria step appear on the Suggested Results page. Only notes that were entered for the same section or item by the same person appear on the list.

This field is enabled only if the Comments check box is selected for the role.

---

**Note.** The Notepad functionality allows additional keys to be stored to support the retrieving of notes at the item level from the writing tools feature. The additional keys enable the Notepad to store the item ID for notes taken at the item level on the Establish Criteria document. Capturing this information allows the system to display only the notes taken for an item when a user selects the writing tool feature at the item level within an evaluation.

When the writing tools link is selected at the item level on the evaluation, the system only displays the notes taken for that item. Therefore, when a user takes a note on an item in the Establish Criteria document, the system additionally stores the item ID in the Notepad. When the user later selects the Writing Tools link for a comments box at the item level the system only displays notes that were taken against that item.

If the user selects the writing tool at a section level, the system displays all notes for every item within that section.

---

### ***Item Tab***

<b>Comments</b>	Select this check box to have items in the section contain an area for authors to add a free-form description of the employee's performance on the item. If this check box is selected, the Results Writer, Development Tips, Other Evaluator Comments, and Notes check boxes are enabled for the role. The use of these fields is analogous to the same fields under the Section tab.
<b>*Results Writer</b>	Same as Section tab.
<b>*Development Tips</b>	Same as Section tab.
<b>Other Evaluator Comments</b>	Same as Section tab.
<b>Notes</b>	Same as Section tab.

### ***Edit Tab***

<b>Add</b>	Select this check box to enable the role to add items to this section. If the role can add items, they can also update and delete items that they add.
<b>Update</b>	Select this check box to enable the role to update items in this section on the documents that are generated for the role that were added by a source other than themselves (for example, manager, profile, template or cascaded).
<b>Delete</b>	Select this check box to enable the role to delete items in this section on the documents that are generated for the role that were added by a source other than themselves (for example, manager, profile, template or cascaded).
<b>Copy Objective Items</b>	Select this check box to enable the role to copy business objective items into the documents that are generated for the role.
<b>Copy Manager's Items</b>	Select this check box to enable the role to copy items from the manager's document into the documents that are generated for the role.

## **Profile Management Tab**

<b>Update Person Profile</b>	<p>Select this check box if you want the system to update the employee's profile in the Manage Profiles business process with this document.</p> <p>This field is enabled if the section items have the Rate check box selected and if a content type is entered in the Content Type field in the Items group box on the Template Definition - Structure page.</p> <hr/> <p><b>Note.</b> no evaluations (peer, employee, manager, etc. ) should be sent to Profile Management until the Document Status = Complete. Additionally it states in the Rel 9.0 HDD that no items should be sent to Profile Management from any evaluation until the document has been approved. Since approvals aren't required in ePerformance this means that no items should be sent to Profile Management until the Document = Complete, meaning the Manager Evaluation Status = Complete and therefore the Document Status (header level) = Complete.</p> <hr/>
<b>Person Profile Type</b>	<p>Select the profile type. These profile types are defined in the Manage Profiles business process with an Identity Option equal to <i>Person</i>.</p> <p>This field is available if the Update Person Profile check box is selected.</p>
<b>Instance Qualifier</b>	<p>Select an instance qualifier that distinguishes this evaluation from other evaluations in the Manage Profiles business process. ePerformance delivers an instance qualifiers that allow the evaluations coming from ePerformance to be identified as <i>Manager</i>, <i>Nominee</i>, or <i>Self</i>.</p>

## **Adding Criteria to Sections**

Access the Template Definition - Content page (Set Up HRMS, Product Related, ePerformance, Document Structure, Template Definition, Content).

The screenshot displays the 'Content' tab of a document template definition interface. At the top, there are navigation tabs for 'General', 'Process', 'Structure', and 'Content'. Below these, document metadata is shown: 'Document Type: PERFORM Performance Document', 'Template ID: KOPERF', and 'Effective Date: 01/01/1980'. A 'Sections' section is active, showing 'Goals Section' with a 'Load Content from Profile' link. Below this is the 'Section Items' section, which contains a single item with the following details: 'Item ID: K0000001', 'Title: Increase customer satisfaction by 10%', 'Description: Increase customer satisfaction by 10% by year end.', 'Employee Measurement' (with a text area), 'Rating Model' (with a search icon), 'Aligned To', 'Due Date', 'Start Date', and 'End Date' (all with calendar icons). At the bottom of the item details are two checkboxes: 'Stretch Goal' and 'Mark Item Private'.

Template Definition - Content page

Only the sections entered on the Template Definition - Structure page are available on this page. To add more sections, go to the Template Definition - Structure page.

**Load Content from Profile** Click this link to display the Load Content from Profile page.

**Section Items**

The fields in this group box are available only if you select the Enable Items check box on the Template Definition - Structure page. Items automatically appear here when you click the Load Content from Profile link. You can view, add, edit, or delete items to track or rate on the document.

Add free-form items if the Free-Form Allowed check box for this section is selected on the Template Definition - Structure page.

<b>Item ID</b>	<p>Select an item from the Content Item Detail (JPM_CAT_ITEM) table.</p> <p>You can only select content items that are linked to the content type entered in the Content Type field on the Template Definition - Structure page.</p> <p>This field does not apply to free-form items.</p>
<b>Title</b>	<p>Enter the title for a free-form item.</p> <p>You can only enter titles for free-form items. Otherwise, the system displays the text that was entered in the Description field on the Content Items - Items Details page.</p>
<b>Description</b>	<p>Enter the description for a free-form item that you are adding.</p> <p>You can only enter descriptions for free-form items. Otherwise, the system displays the text that was entered in the ePerformance Description field on the Content Items - Items Details page.</p> <p>This field is enabled only if you selected the Description check box in the Items group box on the Template Definition - Structure page.</p>
<b>Measurement and Employee Measurement</b>	<p>Enter text that clearly and objectively describes the standard by which this item is measured. This text appears on the performance or development document.</p> <p>The system displays this field if the Measures check box is selected on the Template Definition - Structure page.</p>
<b>Level of Difficulty</b>	<p>Select either <i>Advanced</i>, <i>Basic</i>, or <i>Intermediate</i>. Since the values come from the Content Catalog, it follows the same rules as other evaluation criteria fields such as Description and Measurements. To edit the field, select the Edit icon on the Establish Criteria or Document page. Clicking the icon transfers you to the Edit Item page where you can update the criteria.</p> <p>The system displays this field if the Level of Difficulty check box is selected on the Template Definition - Structure page.</p>
<b>Rating Model</b>	<p>Select the rating model for this item.</p> <p>If you selected the Use Section Rating Model check box in the Items group box on the Template Definition - Structure page, the system display the rating model you entered in Rating Model field in the Section group box on the Template Definition - Structure page.</p> <p>The system displays this field if the Rate check box is selected on the Template Definition - Structure page.</p>
<b>Target Rating</b>	<p>Select the rating at which the employee should be performing for this section item.</p> <p>The system displays this field if the Target Rating check box is selected on the Template Definition - Structure page.</p>
<b>Weight</b>	<p>Enter the percentage amount that this section contributes to the overall weight.</p> <p>The system displays this field if the Weight check box is selected on the Template Definition - Structure page.</p>

<b>Minimum Weight</b>	<p>Enter the minimum percentage amount that you want this item to contribute to overall weight.</p> <p>The system displays this field if the Minimum Weight check box is selected on the Template Definition - Structure page.</p>
<b>Supports</b>	<p>Select one of the section items associated with the linked section.</p> <p>The system displays this field if you selected the Support check box and selected a section in the Link field on the Template Definition - Structure page.</p>
<b>Due Date</b>	<p>This field can be used to track the progress of an item and whether it was completed on time.</p> <p>The system displays this field if the Due Date check box is selected on the Template Definition - Structure page.</p>
<b>Reminder Date</b>	<p>This date is used only for informational purposes.</p> <p>The system displays this field if the Reminder Date check box is selected on the Template Definition - Structure page.</p>
<b>Owned By</b>	<p>Select whether the <i>Employee</i> or <i>Manager</i> is responsible for the completion of this item.</p> <p>The system displays this field if the Ownership check box is selected on the Template Definition - Structure page.</p>
<b>Mandatory</b>	<p>Select this check box to prevent anyone from editing or deleting this item on the document.</p> <p>The system displays this field if the Mandatory check box is selected on the Template Definition - Structure page.</p> <hr/> <p><b>Note.</b> This selection overrides the value in the Mandatory field on the job profile. If you specify that an item on the job profile is mandatory and do not select this check box, the item is not mandatory on the document.</p> <hr/>
<b>Critical</b>	<p>Select this check box to have the word <i>Critical</i> appear in the detail area of the item on the document.</p> <p>The system displays this field if the Critical check box is selected on the Template Definition - Structure page.</p>
<b>Sub-Items</b>	<p>Use this group box to add sub-items for each item. The system displays this group box only if you select sub-items on the Structure page.</p>

- Sub-Item ID** To include a sub-item from the prompt table (typically, a sub-competency) in this section of the document, select the subitem ID. You can select from the items that belong to the sub-items table that is identified in the Prompt Table field on the Template Definition - Structure page.
- This field does not apply to free-form items.
- Title** Displays the title of the selected sub-item. If you're adding a free-form sub-item, enter the title here.
- Description** Displays the description of the sub-item. The system displays this field if you selected Descriptions in the Sub-items group box on the Structure page.

## Loading Content from Profiles

Access the Load Content From Profile page (click the Load Content from Profile link on the Template Definition - Content page).

### Load Content From Profile

Search for Content

Content Type: Competencies

Profile Type: Job ▼

Profile ID: 100863 🔍

Select Items

Item ID	Title
<input type="checkbox"/> HOP602	602 Job Profile Competency
<input type="checkbox"/> HOP603	603 Job Profile Competency
<input type="checkbox"/> HOP604	604 Job Profile Competency
<input type="checkbox"/> HOP605	605 Job Profile Competency

[Select All](#)   [Deselect All](#)

[Return to Previous Page](#)

Load Content From Profile page

Enter search information for content criteria, click the Search button, and then select the items that you want added to the Section Items group box on the Template Definition - Content page.

---

**Note.** Remember that these items become part of the template. It is best to only have common items that fit all employees.

---

## Cloning Templates

Access the Clone Template Definition page (Set Up HRMS, Product Related, ePerformance, Document Structure, Clone Template Definition).

### Clone Template Definition

<b>Document Type:</b>	K0ANNUAL Annual Review
<b>Template ID:</b>	KU000001 Average - Appl After Review
<b>Effective Date:</b>	01/01/1980

---

<b>New Document Type:</b>	<input style="width: 80%;" type="text" value="K0ANNUAL"/> Annual Review
<b>New Template ID:</b>	<input style="width: 80%;" type="text" value="ANNUAL09"/>
<b>Effective Date:</b>	<input style="width: 80%;" type="text" value="01/01/2009"/>

Clone Template Definition page

To clone a template:

1. On the Search page, select the document type that you want to clone.
2. Click Search.
3. Select the document template ID that you want to clone.  
     The system displays the Clone Template Definition page.
4. Select the new document type from the New Document Type field.
5. Enter up to eight alphanumeric characters for the new template ID.
6. Select the effective date for the new template.
7. Click the Save button.

---

**Note.** If the system finds a match in the template type and period end date for the same employee, it displays an error message: *A document already exists for document type, and period dates nn/nn/nnnn - nn/nn/nnnn. If you think you have received this message in error, contact your system administrator.*

---

## Chapter 4

# Setting Up Text for Advisor Tools

This chapter provides an overview of advisor tools and discusses how to:

- Define content for the Language Checker tool.
- Define content for the Development Tips and Results Writer tools.
- Link development tips to competencies and sub-competencies.
- Import third-party content.
- Build Verity search indexes.

---

## Understanding Advisor Tools

This section lists common elements and discusses:

- Template setup for using results writer and development tips.
- Search collections for results writer and development tips.

## Common Elements Used in this Chapter

### Language Checker

Evaluators use the Language Checker tool during the evaluation process to identify words or phrases in a performance document that an organization deems objectionable and to view suggested alternatives. The system checks all Comments text boxes for inappropriate content.

You can manually define content for the Language Checker tool, or you can import data from a third-party vendor.

---

**Note.** To enable the Language Checker tool, select the Language Checker check box on the Template Definition - General page.

---

**Results Writer**

Evaluators use the Results Writer tool to select predefined statements that describe an employee's level of proficiency in a particular competency or sub-competency. Managers can use this tool by clicking a Writing Tools link that appears in the comments box at the item or section level on the evaluation. For example:

*Bob's initiative is very impressive. He does not wait to be told what to do. His energy sets an example for the rest of the team.*

When you define competencies and sub-competencies, you can use the Results Writer page of the Competency and Sub-Competency components to enter the statements from which managers can select when they use writing tools. You can also import this content from third-party suppliers.

**Development Tips**

Development tips suggest ways for employees to improve, develop, or use a competency or sub-competency based on their current rating level. If you use ePerformance and have implemented this feature, the system displays the appropriate set of tips when you click the Writing Tool link on an evaluation.

## Template Setup for Using Results Writer and Development Tips

You can define text for these tools at either the competency or sub-competency level. You then set up the document template to access this text. The template rules control the level of text, by competency or sub-competency, that the system searches to find text suggestions for a section or item.

You must set the template rules to correspond to the level at which the text is defined. For example, if you define text or bring in text from a third party at the sub-competency level, then you must set the Results Writer and Development Tips template switches to *Sub-Competency* for the tool to locate text.

The combination of the level at which text is defined, the level at which the tool is enabled on the document template, and the ratings that the user enters, determine the suggested results that appear when the user clicks the Writing Tools link on an evaluation.

This table shows the results for the possible combinations of link level, text level, and ratings entered.

<b>Writing Tools Link Appears at Level</b>	<b>Text Defined at Level</b>	<b>Ratings Entry Required</b>	<b>What Appears in Suggested Results</b>
Item	Competency	The item is rated. If using subitems (behaviors), the item rating was calculated.	Competency text for the item and rating.
Item	Sub-competency	At least one subitem for the item is rated.	Sub-competency text for the item, subitem, and rating.
Section	Competency	At least one item in the section is rated. If the item has subitems, the item rating was calculated.	Competency text for the item and rating. The Results Writer tool returns one or more entries for every rated item in the section. The Development Tips tool returns one or more entries for every rated item in the section.

<b><i>Writing Tools Link Appears at Level</i></b>	<b><i>Text Defined at Level</i></b>	<b><i>Ratings Entry Required</i></b>	<b><i>What Appears in Suggested Results</i></b>
Section	Sub-competency	Subitem. At least one subitem for an item in the section is rated.	Sub-competency text for the item, subitem, and rating. The Results Writer tool returns one or more entries for every rated subitem in the section. The Development Tips tool returns one or more entries for every rated subitem in the section.

**See Also**

Chapter 3, "Setting Up Document Templates," Creating Document Templates, page 43

**Search Collections for Results Writer and Development Tips**

Any time you make an addition or deletion to Results Writer or Development Tips items, you need to rebuild the search index to reflect the new state of the collection of items. The Writing Tools use this search index to locate text when either the Results Writer or Development Tips tool is enabled for a section or item.

**See Also**

Chapter 10, "Consolidating Feedback from Evaluators," Working with Writing Tools, page 188

---

**Defining Content for the Language Checker Tool**

To define content for the Language Checker tool, use the Language Checker Suggestions (EP\_CHK\_SUG\_TBL) and Language Checker Words (EP\_CHK\_WRD\_TBL) components.

This section discusses how to:

- Define objectionable words and phrases.
- Define suggested wording.

**See Also**

Chapter 10, "Consolidating Feedback from Evaluators," Working with Writing Tools, page 188

## Pages Used to Define Language Checker Content

Page Name	Definition Name	Navigation	Usage
Language Checker Word	EP_CHK_WRD_TBL	Set Up HRMS, Product Related, ePerformance, Advisor Tools, Language Checker Words, Language Checker Word	Define the objectionable words and phrases, and link them to suggested wordings.
Language Checker Suggestion	EP_CHK_SUG_TBL	Set Up HRMS, Product Related, ePerformance, Advisor Tools, Language Checker Suggestions, Language Checker Suggestion	Define suggested wordings.

## Defining Objectionable Words and Phrases

Access the Language Checker Word page (Set Up HRMS, Product Related, ePerformance, Advisor Tools, Language Checker Words, Language Checker Word).

### Language Checker Word

Language Check ID: K0000AGE

---

\*Words and Phrases:

\*Content Supplier:

\*Suggestion ID:

Language Suggestions: It is best not to refer to an employees age or maturity when describing the employees ability or inability to perform job tasks or functions.

Language Checker Word page

### Words and Phrases

Enter the word or phrase that is deemed inappropriate in a performance document. Case is not important (the Language Checker tool is not case-sensitive). When invoked, the Language Checker tool follows these search rules:

- If you enter a single word here, the Language Checker tool searches for whole words that match.
- If you enter multiple words, the Language Checker tool looks for phrases with an exact match.

### Content Supplier

Select the source of the content. The default value is *Customer Defined*.

**Suggestion ID** Enter the ID for the suggested words or phrases that managers can use instead of the words and phrases entered on this page. You define language suggestions and IDs on the Language Checker Suggestion page.

**Language Suggestions** Displays the language suggestions that are associated with the suggestion ID.

## Defining Suggested Wording

Access the Language Checker Suggestion page (Set Up HRMS, Product Related, ePerformance, Advisor Tools, Language Checker Suggestions, Language Checker Suggestion).

Language Checker Suggestion page

**Content Supplier** Select the source of the content: *Customer Defined* or the third-party supplier's name.

**Language Suggestions** Enter language suggestions for words and phrases, or list the reasons why the manager should not use certain words and phrases.

**Proper Usage** Enter examples of the proper usage of words or phrases.

**Incorrect Usage** Enter examples of the incorrect usage of words or phrases.

---

## Defining Content for the Development Tips and Results Writer Tools

To define content for the Development Tips and Results Writer Tools, use the Define Development Tips (EP\_DEV\_TIP\_TBL\_EP) and Results Writer (EP\_COMP\_WRT\_TBL) components.

This section lists prerequisites and discusses how to:

- Define development tips.
- Define Results Writer text for competencies.

### **See Also**

Chapter 10, "Consolidating Feedback from Evaluators," Working with Writing Tools, page 188

*PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles, "Setting Up the Content Catalog"*

## Prerequisites

Text entries for the Results Writer and Development Tips tools are related to competencies and their proficiency level, and sub-competencies and their proficiency level. You must set up this information before defining text for these tools.

- Rating models.
- Competencies and sub-competencies.
- Competency and sub-competency proficiency levels.

If multiple business units and setIDs are implemented in PeopleSoft Enterprise Human Resources, the information that you use and create is determined by how the business unit and setID functionality is set up for the user ID.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables."*

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles, "Setting Up the Content Catalog."*

## Pages Used to Define Content for the Development Tips and Results Writer Tools

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Define Development Tip	EP_DEV_TIP_TBL	Set Up HRMS, Product Related, ePerformance, Advisor Tools, Define Development Tips, Define Development Tip	Define development tips. Also display and modify development tips imported from third-party suppliers.
Results Writer - Competency	EP_COMP_WRT_TBL	Set Up HRMS, Product Related, ePerformance, Advisor Tools, Results Writer, Competency	Define Results Writer statements for each level of proficiency associated with a competency.
Results Writer - Sub-Competencies	EP_SUB_WRT_TBL	Set Up HRMS, Product Related, ePerformance, Advisor Tools, Results Writer, Sub-Competencies	<p>Define Results Writer statements for each level of proficiency associated with a sub-competency.</p> <p><b>Note.</b> The Results Writer - Sub-Competencies page is similar in appearance and use to the Results Writer - Competency page and is not documented separately.</p> <p>See <a href="#">Chapter 4, "Setting Up Text for Advisor Tools," Defining Results Writer Text for Competencies, page 78.</a></p>

### Defining Development Tips

Access the Define Development Tip page (Set Up HRMS, Product Related, ePerformance, Advisor Tools, Define Development Tips, Define Development Tip).

Define Development Tip page

**Content Supplier** Select the content supplier for the development tip. Select a third-party supplier from the available options, or select *Customer Defined* to enter development tips.

## Defining Results Writer Text for Competencies

Access the Results Writer - Competency page (Set Up HRMS, Product Related, ePerformance, Advisor Tools, Results Writer, Results Writer - Competency).

Results Writer - Competency page

Review ratings describe an employee's level of proficiency for a competency. For each review rating that is associated with the competency, you can define the suggested text that managers can use when they invoke the Results Writer tool. You can create one or more text entries for each rating.

---

**Note.** When you access the Sub-Competencies page, the first sub-competency that is associated with the competency appears. You must page forward or use the View All link to access other sub-competencies.

---

**Seq Nbr** (sequence number) Enter a number that determines the order in which managers see the statements when they use the Results Writer tool for this competency.

**Results Writer** Enter one or more sentences to describe the selected proficiency level. You can insert the following characters to personalize the text based on the employee's name and gender.

- %1 = Employee's First Name
- %2 = He or She
- %3 = His or Her
- %4 = Him or Her
- %5 = Himself or Herself

---

## Linking Development Tips to Competencies and Sub-Competencies

To link development tips to competencies and sub-competencies, use the Link Development Tips (EP\_COMP\_DEV\_TBL) component.

This section discusses how to link development tips to competencies and sub-competencies.

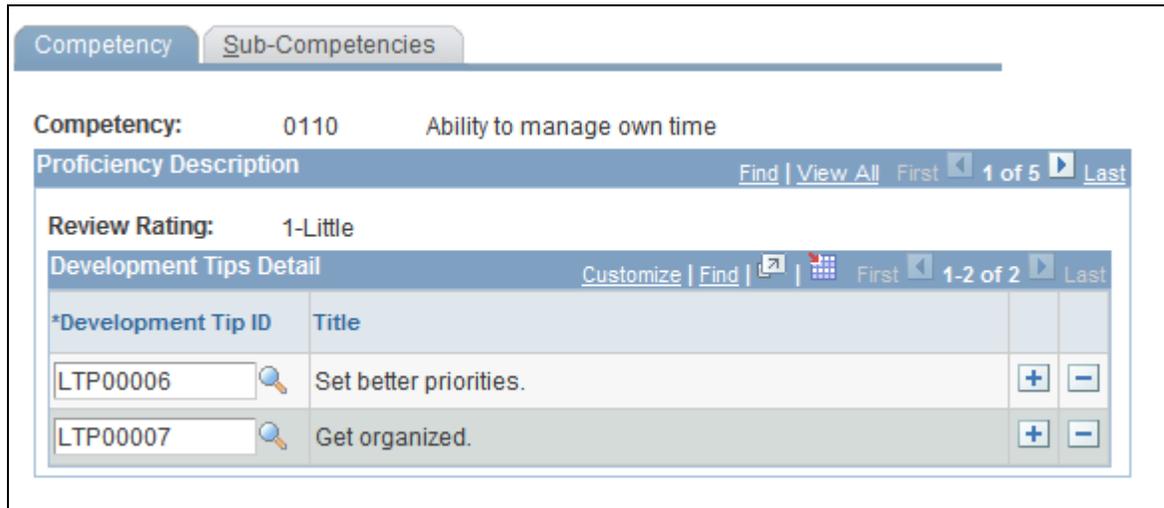
### Pages Used to Link Development Tips to Competencies and Sub-Competencies

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Link Development Tips - Competency	EP_COMP_DEV_TBL	Set Up HRMS, Product Related, ePerformance, Advisor Tools, Link Development Tips, Competency	Links one or more developments tips to a competency.

Page Name	Definition Name	Navigation	Usage
Link Development Tips - Sub-Competencies	EP_SUB_DEV_TBL	Set Up HRMS, Product Related, ePerformance, Advisor Tools, Link Development Tips, Sub-Competencies	Links one or more developments tips to a sub-competency.  <b>Note.</b> The Link Development Tips - Sub-Competencies page acts in a similar fashion to the Link Development Tips - Competency page and is not documented separately.

## Linking Development Tips to Competencies

Access the Link Development Tips - Competency page (Set Up HRMS, Product Related, ePerformance, Advisor Tools, Link Development Tips, Competency).



Link Development Tips - Competency page

Review ratings describe an employee's level of proficiency for a competency. For each review rating that is associated with the competency, you can define the suggested text that managers can use when they invoke the Development Tips tool. You can create one or more text entries for each rating.

**Development Tip ID** Select a development tip from the list of available tips that were created using the Define Development Tips page. The development tip links to the competency that you selected to access this page.

---

**Note.** When you access the Sub-Competencies page, the first sub-competency that is associated with the competency appears. You must page forward or use the View All link to access other sub-competencies.

---

## Importing Third-Party Content

This section provides an overview of importing third-party content for the Language Checker tool and lists the pages used to import data.

### See Also

*PeopleSoft 9.1 Enterprise Components PeopleBook*

*Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker*

## Understanding Third-Party Data Import

PeopleSoft has established partnerships with several third-party providers that supply content for defining competencies and proficiency levels. Some content providers also provide content for the Development Tips and Language Checker tools that are delivered with ePerformance. You can import third-party data into the system, enter free-form content, or use a combination of both.

ePerformance uses PeopleTools Integration Broker to receive vendor-supplied data in the form of comma-delimited flat files. The flat files are imported into ePerformance using the Inbound File Publish Application Engine (EOP\_PUBLISHF) process. You do not need to develop an interface to load third-party content into ePerformance.

### Preparing to Import Data

To prepare to import data, activate inbound file rules for the file you are importing on the Inbound File page. You also use this page to associate messages with files and optionally change the default directory for incoming files from `c:\temp` to a directory that you choose.

This table lists the identifiers for the inbound file rules.

<b><i>File Identifier</i></b>	<b><i>Description</i></b>
EP_CHK_SUG	Language Checker suggestions
EP_CHK_WRD	Language Checker words and phrases
EP_COMPETENCY	Competencies
EP_COMP_DEV	Development tips for competencies
EP_COMP_PROF	Proficiency statements for competencies

<b><i>File Identifier</i></b>	<b><i>Description</i></b>
EP_DEV_TIP	Development tips
EP_RATING_MDL	Rating models
EP_REVW_RATING	Levels of ratings for rating models
EP_SUB_COMP	Sub-competencies
EP_SUB_DEV	Development tips for sub-competencies
EP_SUB_PROF	Proficiency statements for sub-competencies
EP_SUB_WRT	Results Writer statements for sub-competencies

### ***Importing Data***

To import data:

1. Make sure that each channel is running (not paused).

Channels are delivered paused.

Follow the procedure for configuring a message channel.

See *PeopleTools PeopleBook: PeopleSoft Integration Broker*

2. Ensure that each message, its PeopleCode subscription, and its Integration Broker transaction are active.
3. Open PeopleSoft Process Scheduler.

The application server must have publish and subscribe running.

See *PeopleTools PeopleBook: System and Server Administration*

4. For each file identifier, initiate the publish process.

The publish process converts the flat file to a message.

- a. Select Enterprise Components, Integration Definitions, Initiate Processes, Inbound File Publish.
- b. Create a run control and initiate the process.

Follow the procedure for using the inbound file pages for processing files.

See *PeopleSoft 9.1 Enterprise Components PeopleBook*

5. Confirm that the process is complete through the Process Monitor page.

6. Confirm that the subscription occurred.
  - a. Access the Monitor Message component by selecting PeopleTools, Integration Broker, Monitor, Monitor Message.
  - b. Select the local node in the Publish Node field and *Subscription Contract* in the Queue Type field.

Look for a subscription contract for the message just processed.

## Pages Used to Import Data

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
File Inbound	EO_FILE_INBOUND	Enterprise Components, Integration Definitions, Inbound File Rule, File Inbound	Select the file that you are importing into the Advisor tools.
Inbound File Publish - Inbound File	EO_FILETOMSG	Enterprise Components, Integration Definitions, Initiate Processes, Inbound File Publish, Inbound File	Initiate a background process to populate entries from third-party providers.
Process List	PMN_PRCSLIST	Click the Process Monitor link on the File Inbound page.	View the status of background processes that you initiate.

---

## Building Verity Search Indexes

This section provides an overview of search indexes and lists the pages used to build Verity search indexes.

### Search Indexes

When you either add or remove Results Writer or Development Tips text items, you must rebuild the Verity search index to accurately reference these items in the database. If you do not rebuild the index, the system user will not see the added content when using the writing tools.

These are the search indexes to rebuild for each item that you change:

<b>Search Index</b>	<b>Content Type</b>
EP_COMP_DEV_VW	Development tips for competencies.
EP_COMP_WRT_TBL	Results writer for competencies.
EP_DEV_TIP_TBL	Development tips that are not linked to competencies or sub-competencies.

<b>Search Index</b>	<b>Content Type</b>
EP_SUB_DEV_VW	Development tips for sub-competencies.
EP_SUB_WRT_TBL	Results writer for sub-competencies.
EP_CMP_DEV_LANG	Development tips for competencies: related language.
EP_COMPWRT_LANG	Results writer for competencies: related language.
EP_DEV_TIP_LANG	Development tips that are not linked to competencies or sub-competencies: related language.
EP_SUBWRT_LANG	Development tips for sub-competencies: related language.
EP_SUB_DEV_LANG	Results writer for sub-competencies: related language.

These Search Index definitions are predefined in the system. You must manually rebuild them any time you make a change to Results Writer or Development Tips content, including when you load content from a third-party provider. The search indexes are built using PeopleTools pages.

---

**Note.** If you don't use languages other than English, you do not need to build the indexes whose object name ends in `_LANG`

---

### **See Also**

Chapter 10, "Consolidating Feedback from Evaluators," *Working with Writing Tools*, page 188

*Enterprise PeopleTools PeopleBook: System and Server Administration*

## **Pages Used to Build Search Indexes**

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Design a Search Index	SID_RGW	PeopleTools, Search Engine, Record-Based Indexes, Design a Search Index	Build a search index after you have changed any entries for development tips or results writer text.
Search Index Admin	SIA_ADMINISTER	PeopleTools, Search Engine, Administration, Search Index Admin	Select search indexes for deletion, modification, or scheduling builds.
Edit Properties	SIA_IDXPROP_SEC	Click the Edit Properties link on a listed index on the Search Index Admin page.	Enter languages for which to build a related language search index.

## Chapter 5

# Generating Documents

This chapter provides an overview of document generation and discusses how to:

- Generate documents as an administrator.
- Generate documents as a manager.
- Generate documents as an employee.
- Access documents.

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**Note.** The process for generating performance and development documents is the same. The examples in this chapter refer to performance documents, but equally apply to development documents.

---

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## Understanding Document Generation

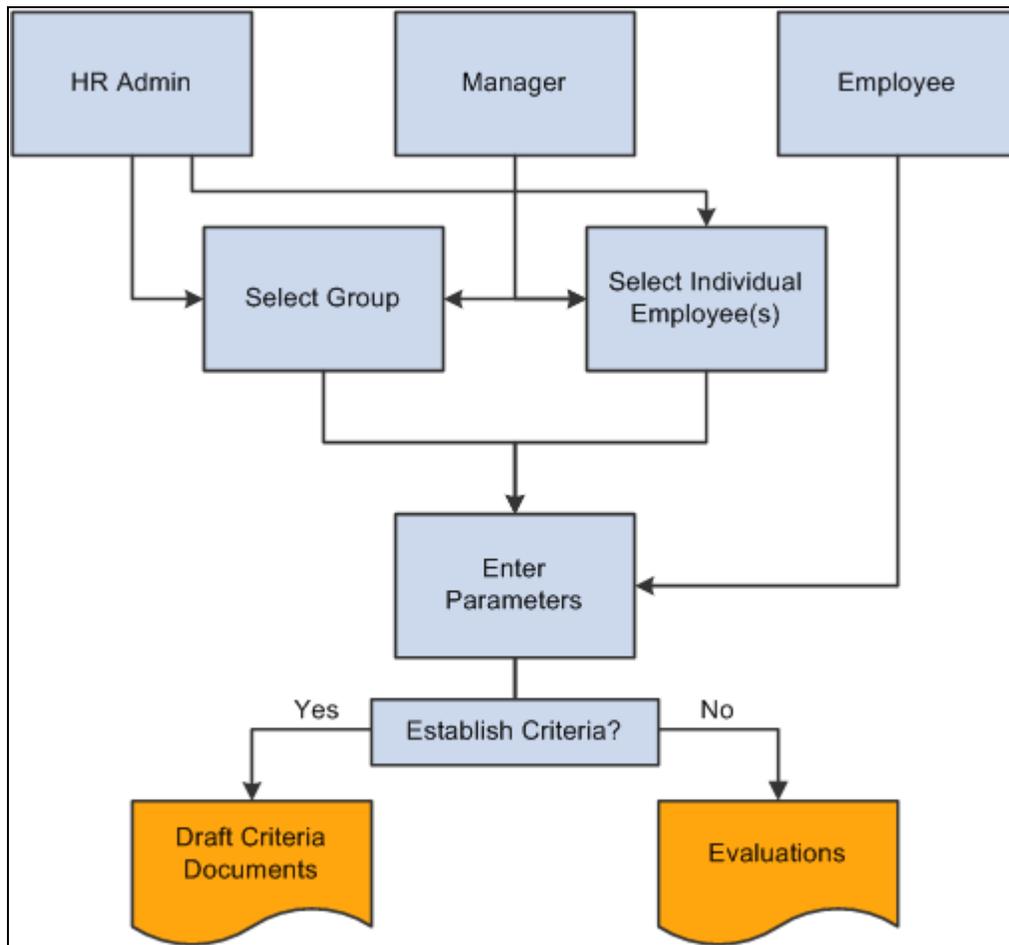
This section discusses:

- Document generation process.
- Document cloning
- Document content.
- Initializing from profiles.

## Document Generation Processes

Document generation initiates the evaluation process. The process for generating a document varies, depending on the role of the person that is generating the document. The process culminates in the creation of a criteria document for each participant identified in the Section Roles group box on the Template Definition - Structure page.

This diagram shows the document generation process for HR administrators, managers, and employees:



Document generation diagram illustrating where in the process the HR Administrator, manager, and employee typically interact with the system

Each of the three roles that can generate documents does so in slightly different ways:

- HR Administrators schedule a background process and select one or more employees or employee groups.
- Managers can select one employee group that reports to them and select one or more employees from the group, or just select one or more employees that report to them.
- Employees can only generate documents for themselves.

After the individuals are identified, the process initiator must select the parameters for the document. These include the document type, document template, and evaluation period that is covered. The language code might be required, depending on the installation settings. For employee-initiated documents, if the employee has more than one job, the job title is required. The employee might also need to select a manager or mentor for the evaluation, if specified for the document type.

Once a user enters the parameters, the system checks the rules associated with the document type and the document template, such as:

- Is Establish Criteria enabled?
- Is Nominate Participants enabled?

Based on the rules established by the document type and document template, the system creates an internal baseline document and populates the Document Details page with the appropriate steps associated with the evaluation process.

## Cloning Documents

To facilitate document creation, ePerformance enables managers and employees to clone existing documents. This can be helpful when documents are extensively modified or the same changes apply to multiple employees.

To activate the cloning feature, select the Manager, Employee, or both check boxes on the Document Type page. This causes the Clone from Document field to display on the Create Performance Document and Create Development Document pages.

When managers clone a document, they select a document for one of their direct reports to use as the source. When employees clone a document, they select one of their own documents to use as the source. The system uses the structure of the document, not the rating information, as the basis for the new document.

## Document Content

The criteria or content items included in a document are determined by the associated template. You can add new items and free-form items to the Criteria document or the Evaluation Document, if the Add check box is selected for the user role in the Item tab on the Template Definition - Structure page. Free-form items also require the selection of the Free-Form Allowed check box.

## Initializing From Profiles

When you generate documents and Initialize from Profile is selected on the Template Definition - Structure page, the system checks to see if there are items to add to the document based on the nonperson profiles associated to the employees job information.

If Initialize from Profile is selected, the system:

1. Identifies the profile type entered in the Profile Type field in the Profile Management group box on the Template Definition - Structure page
2. Identifies all profile IDs associated with the profile type.
3. Identifies all the profile identity options and keys associated with the profile IDs.
4. Orders those profile-identity options according to the sequence defined on the Profile Identity Options - Configuration page.
5. Identifies the employee job information record.

6. Looks at the first profile identity option in the sequenced list to see if there is data for that item in the employee's job information record that matches the key.
  - a. If there is a match, the system adds the associated content items from the profile ID to the document.
  - b. If there is no match, the system checks the next profile identity option in the sequenced list.
  - c. If it is the end of a sequenced list, the system stops the process.

Here is the mapping between ePerformance and the Job Profile Manager (JPM) when an item is initialized from the Profile:

<i>ePerformance Field Label</i>	<i>Job Profile Manager Field Name</i>
Item ID	JPM_CAT_ITEM_ID
Rating Model	RATING_MODEL
Target Rating	JPM_RATING1
Weight	JPM_PCT_1
Minimum Weight	JPM_PCT_1
Due Date	JPM_DATE_1
Reminder Date	JPM_DATE_2
Mandatory	JPM_MANDATORY
Critical	JPM_YN_2

**Note.** On the Template Definition - Structure page you can insert free-form items by selecting the Free-Form Allowed check box and then selecting the items that you want to appear on documents. You can also click the Load Content from Profile link on the Template Definition - Content page to add content items. When you initiate the creation process, the system loads these items into the Establish Criteria or Evaluation sections on documents.

---

## Prerequisites for Generating Documents

Before generating documents, you must:

1. Define templates.
2. Identify the template source on the Document Type page.

### 3. Define group IDs (optional).

To generate documents for a group of employees, HR administrators or managers can choose to specify the ID of the group that contains the employees they want to process.

---

**Note.** The approval process within ePerformance does not support group ID. Group ID cannot be used as an approval method because the system does not store group ID on the document. Therefore, the system does not have a way to determine which group ID to use when a user is approving a document.

---

### 4. Connect employees to managers in PeopleSoft Enterprise Human Resources.

### 5. Update the profile function in the Evaluation - Role Rules grid on the Template Definition - Structure page (optional).

This page has a Profile Management tab. For each role, it has an Update Person Profile check box. If you select this check box, the system enables the Person Profile Type and Instance Qualifier fields. Select the appropriate field values for the role and then click Save. If the Event Manager is implemented, the system sends the evaluation document data to the Job Profile Management (JPM) person profile when the manager completes the document. The system sends other role document data to the person profile only when other role document information has been added and the manager has completed the document.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Working with HCM Transformation Framework."

### 6. Set up notifications on the General Settings page.

See [Chapter 3, "Setting Up Document Templates," Creating Document Templates, page 43.](#)

See [Chapter 3, "Setting Up Document Templates," Defining Document Types, page 23.](#)

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Group Definitions," Setting Up Group Definitions.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Increasing the Workforce."

See [Chapter 2, "Setting Up ePerformance," page 7.](#)

---

## Generating Documents as an Administrator

This section provides an overview on administrator document generation and discusses how to:

- Generate documents.
- View document creation results.

## Understanding Administrator Document Generation

HR administrators schedule a background process and select one or more employee groups to generate documents.

## Pages Used to Generate Documents as an Administrator

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Create Documents	RUNCTL_EPMGRDOC	<ul style="list-style-type: none"> <li>Workforce Development, Performance Management, Performance Documents, Create Documents, Create Documents</li> <li>Workforce Development, Performance Management, Development Documents, Create Documents, Create Documents</li> </ul>	Schedule a background process to generate documents for individual employees or a group of employees using the group ID.
View Document Creation Results	RUNCTL_EPMGRDC_INQ	Workforce Development, Performance Management, View Document Creation Results, View Document Creation Results	View documents that were created by the background process.

## Generating Documents

Access the Create Documents page (Workforce Development, Performance Management, Performance Documents, Create Documents, Create Documents).

## Create Documents

Run Control ID: FY09MID [Report Manager](#) [Process Monitor](#)

### Run Request Parameters

**Period Begin Date:**  
**Period End Date:**

**Document Type:**  
**Template ID:**

**Manager Selection Method:**

### Create Documents Using

Group ID
  Employee ID

### Documents Using Group ID

[Customize](#) | [Find](#) | [View All](#) |  |  | [First](#)  [Last](#)

*Group ID	As Of Date	Description	Language Code
1 <input type="text" value="H0GRP1"/> <input type="button" value="magnifying glass"/>	<input type="text" value="04/13/2009"/> <input type="button" value="31"/>	H0GRP1 for Reports	<input type="button" value="+"/> <input type="button" value="-"/>

Create Documents page

### ***Run Request Parameters***

**Period Begin Date** and **Period End Date** Enter the beginning and ending date of the period of time that the document covers.

**Document Type** Enter a document type such as *Performance Document*, *Performance Plan*, or *Annual Review*. You define document types using the Document Type component.

**Template ID** Select the template ID to generate the documents. This field is available if the template source on the Document Types page is *User Defined* for this document type.

## **Manager Selection Method**

Specify a method for selecting manager IDs. When you launch the mass document creation process, the system determines the manager of each employee it processes using data defined in PeopleSoft Human Resources. It needs this information to route email messages to managers informing them that review forms are available, and to associate a manager ID with each document, so that the manager can act as the author of the manager document and the owner of the evaluation process.

Values are:

- *By Department Manager ID:* The system retrieves a manager based on the department of the employee, using the Manager ID field on the Department Profile page.
- *By Group ID:* The system retrieves the manager from the Manager ID field on the Group Profile page.
- *By Manager ID:* If you select this option, you must specify the manager ID in the Manager ID field.
- *By Part Posn Mgmt Dept Mgr ID:* The system searches for a Reports To relationship between managers and employees, and then uses the *By Department Manager ID* selection method if a Reports To ID is not found.
- *By Part Posn Mgmt Supervisor:* The system searches for a Reports To relationship between managers and employees, and then uses the *By Supervisor ID* selection method if a Reports To ID is not found.
- *By Reports To Position:* The system retrieves the manager of the employee's position that is specified in the Position Data component.
- *By Supervisor ID:* The system retrieves the manager based on the Supervisor ID field on the Job Data - Job Information page.

## **Create Document Using**

### **Group ID**

Select this radio button if you want to create documents using the group ID. The system displays a group box called Documents Using Group ID – Employee Groups to Process.

### **Employee ID**

Select this radio button if you want to create documents using the employee ID. The system displays a group box called Documents Using Employee ID – Employees to Process.

## **Documents Using Group ID – Employee Groups to Process**

### **Group ID**

Specify the employee groups for which you want to generate documents.

<b>As of Date</b>	Enter the date from which you want to generate the group that is used in the document creation process. The current system date is the default.
	<hr/> <b>Note.</b> The mass creation process always regenerates the selected groups before it creates employee documents. <hr/>
<b>Language Code</b>	Select a language code to generate documents in a different language than the base language of the database. This field is available only when the Allow Review Language Override check box is selected on the ePerformance Installation table.

### ***Documents Using Employee ID – Employees to Process***

<b>EmplID</b> (employee ID)	Select the employees for which you want to generate documents.
<b>Empl Rcd</b> (employee record)	Specify the employee's record number for which you want to generate documents.
<b>As of Date</b>	Enter the date from which you want to generate documents for the employees. The current system date is the default.
<b>Language Code</b>	Select a language code to generate documents in a different language than the base language of the database. This field is available only when the Allow Review Language Override check box is selected on the ePerformance Installation table.

### **See Also**

[Chapter 2, "Setting Up ePerformance," Defining System Settings, page 7](#)

*PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions*, "Understanding Position Management"

*PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Group Definitions"

## **Viewing Document Creation Results**

Access the View Document Creation Results page (Workforce Development, Performance Management, View Document Creation Results, View Document Creation Results).

**View Document Creation Results**

Run Control ID: EPERF

**Run Request Parameters**

Period Begin Date: 01/01/2002      Period End Date: 12/31/2002  
 Document Type: K0ANNUAL      Annual Review  
 Manager Selection Method: By Group ID

**Create Documents Using**

Group ID       Employee ID

**Documents Using Group ID**

**Results** Find | View All | First 1 of 1 | Last

Group ID: KU100      Department 13000

**Employee Groups Processed** Customize | Find | First 1-105 of 105 | Last

Empl ID	Empl Record	Name	Template ID	MgrID / MtrID	Supervisor Name	Success?	Status
HXPOS003	0	Roger Federer	Avg -Uses Job Profile	KU0007	Betty Locherty	Yes	Document created successfully
K0W001	0	Antonio Smith	Avg -Uses Job Profile	KU0007	Betty Locherty	Yes	Document created successfully
K0W013	0	Travis Random	Avg -Uses Job Profile	KU0007	Betty Locherty	Yes	Document created successfully
K0W301	0	Ausencio Cruz	Avg -Uses Job Profile	KU0007	Betty Locherty	Yes	Document created successfully
K0W337	0	Jesse Metzger	Avg -Uses Job Profile	KU0007	Betty Locherty	Yes	Document created successfully

View Document Creation Results page

The View Document Creation Results page is only available after you run the Create Documents process. This page lists whether or not the documents were successfully created in the batch process.

## Generating Documents as a Manager

This section provides an overview of the document generation process for direct reports and discusses how to:

- Enter the effective date.
- Select groups.
- Select employees.
- Define document generation parameters.
- Review document creation results.

## Understanding Document Generation

In the manager role, you can generate documents for direct reports by either:

- Selecting a group and then selecting one or more employees within the group.
- Selecting one or more employees directly.

Regardless of which option you choose, you first need to select the *As of* date for determining which employees report to you. You then select the employees for whom you want to generate documents. Finally, you select the document template from which to generate the individual documents and enter the dates of the evaluation period that is covered.

You can generate either performance or development documents. The process is identical, except for the page names and the navigation path by which you access the document generation pages.

## Pages Used to Generate Documents

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Create Performance Documents Create Development Documents	HR_DR_ADDL_INFO	<p>Access this page through different paths to create performance documents or development documents.</p> <ul style="list-style-type: none"> <li>• Manager Self-Service, Performance Management, Performance Documents, Create Documents, Create Performance Documents</li> <li>• Manager Self-Service, Performance Management, Performance Documents, Create Documents by Group, Create Performance Documents</li> <li>• Manager Self-Service, Performance Management, Development Documents, Create Documents, Create Development Documents</li> <li>• Manager Self-Service, Performance Management, Development Documents, Create Documents by Group, Create Development Documents</li> </ul>	Enter the effective date for determining your employees. This is the first page in a series of pages that guide you through the document generation process.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Create Performance Documents Create Development Documents	HR_DR_SELECT_GROUP	Click the Continue button on either the Create Performance Documents or Create Development Documents pages.	This page appears only if you first select the Create Document by Group in the left-hand navigation path. Use this page to select the group ID of the employees for whom you want to create documents.
Create Performance Documents Create Development Documents	HR_DR_SELECT_EMPS	Click the Continue button on either the Create Performance Documents or Create Development Documents page.	This page appears only if you first select the Create Document in the left-hand navigation path. Use this page to select employees for whom you want to create documents.
Create Performance Documents Create Development Documents	EP_CREATEAPPR_MGR	Select one or more employees and click the Continue button on either the Create Performance Documents or Create Development Documents page.	Select the document template and dates that you want to use to create documents.
Create Performance Documents - Results Create Development Documents - Results	EP_CREATE_RESULTS	<ul style="list-style-type: none"> <li>Click the Create Documents button on the Create Performance Documents page.</li> <li>Click the Create Documents button on the Create Development Documents page.</li> </ul>	View the document creation results for the employees that you selected.

## Entering the Effective Date

Access the Create <document type> Documents page (Manager Self-Service, Performance Management, Performance Documents, Create Documents, Create Performance Documents).

## Create Performance Documents

Create new performance documents for one or more of your employees.

---

▼ Instructions

Follow this 3-step process to create performance documents for one or more of your employees:

1. Enter the date used to find the employees that report to you. You will be able to process only those employees that report to you as of this date.
2. Select the employees you are creating new performance documents for.
3. Enter the document details and select Create Documents.

Enter the as of date

Enter the effective date for determining your employees.  

Create <document type> Documents page

Enter the effective date and then click the Continue button.

## Selecting Groups

Access the Create <document type> Documents page (click the Continue button on the either the Create Performance Documents or Create Development Documents pages).

---

**Note.** This page appears only if you first select the Create Document by Group.

---

## Create Performance Documents

Select a Group to Process

---

▼ Instructions

Below is a list of groups that you manage. Select the group you want to use for creating new performance documents.

Select *Continue* when finished

Select a Group

Select Group	
<input checked="" type="radio"/> HXPSSGRP1	Merit Increase Group
<input type="radio"/> HXPSSGRP10	PlanSal Group
<input type="radio"/> HXPSSGRP11	Merit Inc Gp
<input type="radio"/> HXPSSGRP12	Sal Plan Unoffc
<input type="radio"/> HXPSSGRP13	PS Unoffc
<input type="radio"/> HXPSSGRP2	Merit Increase Group
<input type="radio"/> K0BUDGET2002	Salary Budget Group 2002
<input type="radio"/> K0MERIT2001	Merit Increase 2001
<input type="radio"/> KU100	Department 13000
<input type="radio"/> KU120	Project Group for KU0007

Continue

Cancel

Create <document type> Documents page

Select the group ID of the of employees for whom you want to create documents and then click the Continue button.

## Selecting Employees

Access the Create <document type> Documents page (click the Continue button on the either the Create Performance Documents or Create Development Documents pages).

---

**Note.** This page appears only if you first select Create Document.

---

## Create Performance Documents

Select the employees to create new performance documents for.

---

▼ Instructions

Select the employees you are creating new performance documents for.

Once you have finished select *Continue* to enter the document details.

[Return to Previous Page](#)
[View Selected Employees](#)

Select Employees

**Reports To:** Betty Locherty
**As Of:** 04/13/2009

Select Employees

[Customize](#) | [Find](#) |  | [First](#) | [1-6 of 6](#) | [Last](#)

Select	Name	EmplID	HR Status	Job Code Description	Department	+
<input type="checkbox"/>	Cynthia Adams	KU0101	Active	Corporate Controller	Corporate Accounting	
<input type="checkbox"/>	Jill Chancelor	KUL702	Active	Manager-Payroll	Payroll	
<input type="checkbox"/>	Rosanna Channing	KU0046	Active	Senior Manager-Accounting	Corporate Accounting	
<input type="checkbox"/>	Susan Hoinck	KU0119	Active	Analyst-Financial Sr	Corporate Finance	
<input type="checkbox"/>	Netty Owyang	KU0055	Active	Manager-Accounting	International Accounting	
<input type="checkbox"/>	Diane Palmer	K0MTX005	Active	Assistant-Administrative	Corporate Finance	

[Select All](#)
[Deselect All](#)

Create <document type> Documents page

Select one or more employees and then click the Continue button at the bottom or top of the page.



(drill down)

Click the Drill Down button to view a list of employees that report to the manager whose name appears on the left side of the list.

## Defining Document Generation Parameters

Access the Create <document type> Documents page (click the Continue button on either the Create Performance Documents or Create Development Documents pages).

**Note.** This page appears only after you selected employees from the Create Performance Documents or Create Development Documents pages and clicked the Continue button.

## Create Performance Documents

Below is a list of employees that you selected for Performance Document Creation. Complete the information in the *Document Creation Details* section below, then select the **Create Documents** pushbutton to generate documents for these employees.

**Document Creation Details**

Period:	01/01/2009	06/30/2009	
Document Type:	Performance Document		
Create from Prior Document:	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Template:	Performance Multi-Rater		

**Selected Employees**

Employee ID	Last Name	First Name
KU0046	Channing	Rosanna
KU0101	Adams	Cynthia
KUL702	Chancelor	Jill

[Return to Select Employees](#)

Create <document type> Documents page

To enter the parameters:

1. Enter the time period for the document.
2. Enter the document type.
3. If Clone Existing Document is selected on the Document Types page, select whether the document is to be created for an existing document. If you select *Yes*, select the document to clone.
4. If Clone Existing Document is not selected on the Document Types page or *No* is selected in the Create from Prior Document, select the template from which the documents will be created.
5. Click the Create Documents button.

The system displays the Create <document type> Documents – Results page.

## Reviewing Document Creation Results

Access the Create <document type> Documents - Results page (click the Continue button on the either the Create Performance Documents or Create Development Documents pages).

## Create Performance Documents - Results

Below is a list of employees you selected for Performance Document Creation and the results of the process. Employees with errors will need to be re-run after correcting the source of the error.

The "Current Documents" hyperlink at the bottom of the page can be used to access individual performance documents.

Selected Employees				
Employee ID	Name	Template	Successful Creation?	Status
KU0046	Rosanna Channing	Performance Multi-Rater	Yes	Document created successfully
KU0101	Cynthia Adams	Performance Multi-Rater	Yes	Document created successfully
KUL702	Jill Chancelor	Performance Multi-Rater	Yes	Document created successfully

Go To: [Create Documents](#)  
[Current Documents](#)

Create <document type> Documents - Results page

The Selected Employees group box displays the results of the document creation process.

**Create Documents** Click the Create Documents link to go back to the first Current Performance Documents or Current Development Documents page.

**Current Documents** Click this link to go to the Current Performance Documents or Current Development Documents page. The system lists the current documents for which you are the manager.

---

## Generating Documents as an Employee

This section discusses how to generate development documents.

## Pages Used to Generate Documents as an Employee

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Create Performance Documents Create Development Documents	EP_CREATEAPPR_EE	<ul style="list-style-type: none"> <li>Self Service, Performance Management, My Performance Documents, Create Documents, Create Performance Documents</li> <li>Self Service, Performance Management, My Development Documents, Create Documents, Create Development Documents</li> </ul>	Enter parameters for generating documents as an employee.
Person Search - Simple	HR_PSS_SEARCH	Click the Select a Manager link on the Create Performance Documents page or the Create Development Documents page.	Select the person who will function in the manager role for this document.

## Entering Document Parameters

Access the Create Development Documents or the Create Performance Documents page (Self Service, Performance Management, My Performance Documents, Create Documents, Create Performance Documents).

## Create Performance Documents

Complete the information in the *Document Creation Details* section below. If you have multiple jobs effective for the period, select the job you want to be used to create the performance document. Select the **Create** pushbutton once all criteria has been entered.

**Document Creation Details**

**Period:**

**Document Type:**

**Create from Prior Document:**  Yes  No

**Template:**

**Manager:** [Select a Manager](#)

Create <document type> Documents page

<b>Period</b>	Enter the beginning and ending dates of the evaluation period.
<b>Document Type</b>	Select the type of document to generate. Valid document types are defined on the Document Types page.
<b>Create from Prior Document</b>	<p>This field displays if the Employee check box is selected for the Clone Process field on the Document Types page.</p> <p>Select Yes if you want to clone an existing document. Select No if you do not want to clone an existing document.</p> <hr/> <p><b>Note.</b> If you select the same period and document type as an existing document and you try to clone it, the system issues a validation error and stops the cloning process.</p> <hr/>
<b>Prior Document</b>	Select an existing document from which you want to clone a copy. The system displays this field only if you select <i>Yes</i> in the Create from Prior Document field.
<b>Template</b>	<p>Select the document template from which to generate the documents. Document templates are created in the Document Template component.</p> <p>The system displays this field only if you select <i>No</i> in the Create from Prior Document field.</p>
<b>Select a Manager</b>	<p>This field displays if the Employee can Select Manager check box is selected on the Document Types page.</p> <p>Click to access the Person Search page where you can search for and select the person who will act in the manager role for this evaluation.</p>
<b>Select Job</b>	<p>This field appears only if the employee has multiple jobs.</p> <p>Select the job for which the document is generated.</p>

**Create Documents**

Click this button to create the document. After you create the document, the system displays the Document Details page for the document.

---

## Accessing Documents

This section provides an overview of document statuses and discusses how to:

- Select documents.
- View document progress details.

## Understanding Process Statuses

Each process step has several statuses. These statuses control the actions that are available to employees or managers when they access the document. This table shows how the process statuses are set when the document is first generated:

<b>Step</b>	<b>Status</b>	<b>Condition</b>	<b>Effect on Evaluation Process</b>
Establish Criteria	Not Started (NS)	The Establish Criteria check box is selected on the document template.	The Establish Criteria step appears on the Document Progress grid with a status of <i>Not Started</i> and a due date as specified in the document template.
	Not Applicable (NA)	The Establish Criteria check box is not selected on the document template.	The Establish Criteria step does not appear on the Document Progress grid.
Nominate Participants	Not Started (NS)	The Nominate Participants check box is selected on the document template.	The Nominate Participants step appears on the Document Progress grid with a status of <i>Not Started</i> and a due date as specified in the document template.
	Not Applicable (NA)	The Nominate Participants check box is not selected on the document template.	The Nominate Participants step does not appear on the Document Progress grid.
Employee Self Evaluation	Not Started (NS)	The Document check box is selected for the Employee role.	The Complete Self Evaluation step appears on the Document Progress grid with a status of <i>Not Started</i> and a due date as specified in the document template.
	Not Applicable (NA)	The Document check box is not selected for the Employee role.	The Complete Self Evaluation step does not appear on the Document Progress grid.

<b>Step</b>	<b>Status</b>	<b>Condition</b>	<b>Effect on Evaluation Process</b>
Manager Evaluation	Not Started (NS)	The Manager document is required in all cases; therefore, the status for this step is set to NS.	The Review Final Document step appears on the Document Progress grid with a status of <i>Not Started</i> and a due date as specified in the document template.
Employee Self Evaluation	Not Started (NS)	The Document check box is selected for the Employee role.	The Complete Self Evaluation step appears on the Document Progress grid with a status of <i>Not Started</i> and a due date as specified in the document template.
	Not Applicable (NA)	The Document check box is not selected for the Employee role.	The Complete Self Evaluation step does not appear on the Document Progress grid.
Track Nomination	Not Started (NS)	The Track By check box is selected on the Template Definition – Process Page for the Manager, Employee or both roles.	The Track Nominations step appears on the Document Progress grid with a status of <i>Not Started</i> and a due date as specified in the document template.
	Not Applicable (NA)	The Track By check box is not selected on the Template Definition – Process Page for the Manager, Employee or both roles. (If the check box is not selected for the role then that step will not be displayed to that role user.)	The Track Nominations step does not appear on the Document Progress grid.
Review Participants Evaluations	Not Started (NS)	The Accessed By check box selected on the Template Definition – Process page for the Manager, Employee or both roles.	The Review Participant Evaluations step appears on the Document Progress grid with a status of <i>Not Started</i> and a due date as specified in the document template.
	Not Applicable (NA)	The Accessed By check box is not selected on the Template Definition – Process page for the Manager, Employee or both roles. (If the check box is not selected for the role then that step will not be displayed to that role user.)	The Review Participant Evaluations step does not appear on the Document Progress grid.

## Pages Used to Access Documents

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
<p>Current Performance Documents</p> <p>Current Development Documents</p>	EP_APPR_SELECT	<ul style="list-style-type: none"> <li>• Manager Self-Service, Performance Management, Performance Documents, Current Documents, Current Performance Documents</li> <li>• Self-Service, Performance Management, My Performance Documents, Current Documents, Current Performance Documents</li> <li>• Manager Self-Service, Performance Management, Development Documents, Current Documents, Current Development Documents</li> <li>• Self-Service, Performance Management, Development Documents, Current Documents, Current Development Documents</li> </ul>	Select performance or development documents to view or edit.
<p>Current Performance Documents - Document Details</p> <p>Current Development Documents - Document Details</p>	EP_APPR_DETAIL	Click a document on the Current Performance Documents or Current Development Documents page.	View document process, status, and actions.

## Selecting Documents

Access the Current Performance Documents or Current Development documents page (Self-Service, Performance Management, My Performance Documents, Current Documents, Current Performance Documents).

## Current Performance Documents

Betty Locherty

Listed below are your current performance documents.

Performance Documents <span style="float: right; font-size: small;">Customize   Find    First 1 of 1 Last</span>					
Document Type	Begin Date	End Date	Job Title	Status	Manager
<a href="#">Performance Document</a>	01/01/2009	06/30/2009	Director-Finance	In Progress	Jean Parsons

Current Performance Documents page

### ***Performance Documents***

The information that appears on this grid depends on the path with which you access the page.

If you access this page through the Self Service menu, the only documents that appear are current documents for which you are the employee. The name column does not appear, but an additional column on the grid lists the person who is the manager for the document.

If you access this page through the Manager Self Service menu, the grid lists all documents with statuses that are not *Complete* or *Canceled* for which you are the manager. Documents in a *Complete* status are listed on the Historical Documents page.

## **Viewing Document Progress Details**

Access the Document Details page (click a document on the Current Performance Documents or Current Development Documents page).

**Current Performance Documents**

---

**Document Details**

Betty Locherty, Director-Finance  
 Performance Document: 01/01/2009 - 06/30/2009

Performance Document Details			
<b>Employee:</b>	Betty Locherty	<b>Job Title:</b>	Director-Finance
<b>Document Type:</b>	Performance Document	<b>Period:</b>	01/01/2009 - 06/30/2009
<b>Template:</b>	Performance Multi-Rater	<b>Document ID:</b>	457
<b>Manager:</b>	Jean Parsons	<b>Status:</b>	In Progress

Document Progress					
Step		Status	Due Date	Action	Next Action
Establish Evaluation Criteria		In Progress	06/30/2009	<a href="#">Edit</a>	
Nominate Participants		Not Started	07/10/2009		<a href="#">Start</a>
Complete Self Evaluation		Not Started	07/30/2009		
Review Manager Evaluation		Not Started	08/29/2009		

[Return to Select Documents](#)

Document Details page

**Document Progress**

The information that appears on this page is controlled by a combination of the document template, the role that accesses the page, and the status of each step.

- Establish Criteria.

Appears in the Document Progress grid only if the Establish Criteria check box is selected on the Template Definition - General page.

This table shows the possible actions for the Establish Criteria step and the conditions under which each step is enabled. You perform the document template setup on the Establish Criteria region of the Template Definition - Process page.

<b>Action</b>	<b>Step Status</b>	<b>Document Template Setup</b>
Start	<i>Not Started</i>	The Updated By check box is selected for the role.
Edit	<i>In Progress</i>	The Updated By check box is selected for the role.
Complete	<i>In Progress</i>	The role is selected in Completed By field.
View Criteria	<i>Complete</i>	This link appears to all roles that are defined on the document template.

- Nominate Participants.

Appears in the Document Progress grid only if the Nominate Participants check box is selected on the Template Definition - General page and the Nominate Participants check box is selected for that role on the Template Definition - Process page.

This table shows the possible actions for the Nominate Participants step and the conditions under which each step is enabled. You perform the document template setup on the Nominate Participants region of the Template Definition - Process page.

<b>Action</b>	<b>Step Status</b>	<b>Document Template Setup</b>
Start	<i>Not Started</i>	The Updated By check box is selected for the role.
Edit	<i>In Progress</i>	The Updated By check box is selected for the role.
Submit	<i>In Progress</i>	The role is selected in Submitted By field.
View	<i>Complete</i>	This link appears to all roles that are defined on the document template.

- Track Nominations.

Appears in the Document Progress grid only if the Nominate Participants check box is selected on the Template Definition - General page.

<b>Action</b>	<b>Step Status</b>	<b>Document Template Setup</b>
Edit	<i>In Progress</i>	The Tracked By check box is selected for the role.
View	<i>Complete</i>	N/A

- Review Participant Evaluations.

This step appears in the Document Progress grid only if the Nominate Participants check box is selected on the Template Definition - General page. The only action available for this step is *View*. Only the employee or manager role can view participant evaluations, depending on the settings in the Review Participant Evaluations page region on the Template Definition - Process page.

If the Accessed By check box is selected for the role, the role can view a list of participants and their evaluation status. If the Viewed By check box is also selected for the role, an active link to the document is available to view the document itself.

- Complete Self Evaluation or Review Employee Evaluation.

Appears in the Document Progress grid if you select the Document check box for the *Employee* role on the Document Template - General Information page. The step is labeled differently depending on the status of the step and the review process selected.

<b>Action</b>	<b>Step Status</b>	<b>Role</b>
Start	<i>Not Started</i>	<i>Employee</i>
Edit	<i>In Progress</i>	<i>Employee</i>
View	<i>Complete</i>	<i>Employee</i>
View	<i>In Progress</i>	<i>Manager</i>

- Complete Manager Evaluation.

This step always appears in the Document Progress grid because a manager evaluation is always required. The step is labeled differently depending on the status of the step and the review process selected.

The actions for this step are *Start*, *Edit*, and *View*. Depending on the review option that is selected, *Mark Available*, *Review Held*, *Acknowledge*, *Submit*, and *Complete* might also appear.

<b>Action</b>	<b>Step Status</b>	<b>Role</b>
Start	<i>Not Started</i>	<i>Manager</i>
Edit	<i>In Progress</i>	<i>Manager</i>
View	<i>Complete</i>	<i>Employee</i> <i>Manager</i>

Additional actions for the manager evaluation are available if the document template specifies a review process that requires review or approval.

---

**Note.** For the purpose of publishing performance results, the definition of *Complete* depends on the performance process that you select on the Template Definition page when creating templates. Documents that require approval are considered complete when the approval status is *Approved* and the document status is *Complete*. Reviews that do not require approval are considered complete when the document status is *Complete*.

---

See [Chapter 11, "Managing Reviews and Approvals," page 205](#).

### **See Also**

[Chapter 3, "Setting Up Document Templates," page 21](#)

[Chapter 8, "Nominating and Tracking Multi-Source Participants," page 145](#)

[Chapter 7, "Modifying Evaluation Criteria," page 127](#)



## Chapter 6

# Setting Up Business Objectives

This section provides an overview on business objective setup and discusses how to:

- Define objective structures.
- Configure email notifications using the ePerformance installation table.

---

## Understanding Business Objective Setup

This section discusses:

- Business objective overview.
- Permission lists.
- Objective plans.
- Objective section definition.
- Objective template definition.

### ***Business Objective Overview***

The business objective setup pages follow a similar business process as the setup of ePerformance documents. The primary setup tasks used to define performance are ePerformance installation, document type, section definition, and template definition. For business objectives, the setup includes ePerformance installation, the defining of the objective plan, objective section definition, and objective template definition.

### ***Permission Lists***

To support the objective functionality, PeopleSoft created a permission list called Objective Setup. This permission list includes the Objective Plan, Objective Section Definition, and the Objective Template Definition pages. This permission list has been added to the ePerformance Setup Administrator role. This role is responsible for defining all the ePerformance setup under Setup HRMS, Product Related, ePerformance. This role should be used for allowing access to the new setup pages described within this section.

### ***Objective Plans***

Typically organizations define their business objectives each year. This process starts by setting up the new objectives by organization prior to the start of the new business year. Many times managers and employees are completing performance evaluations linked to the objectives of the current year, while the executive team is defining the objectives for the next year.

Since multiple years can simultaneously exist, the system enables you to distinguish the objective pages from one year to the next. The objective plan is used as the high level organizational structure to differentiate the various years of business objective pages. The objective plan identifies the hierarchy method. For department hierarchies, the objective plan also identifies the tree that is needed to link organizational objectives pages for a particular period to a predefined hierarchy that is created in Tree Manager.

### ***Objective Section Definition***

The Objective Section Definition page is used to setup the various sections that make up an objective plan. On this page you define the name of the section and rules for the section. The section rules can change over time. Therefore, this record is effective dated. Additionally the objective sections define the content type used in the section, the properties (fields), and the attributes that pertain to that section. Once defined, these sections are used in objective templates.

### ***Objective Template Definition***

To define the various layouts of the objective pages, the administrator sets up the objective templates. On the template the administrator defines the header and various sections that will be displayed and used on the page. Templates can change over time. To retain history, templates are effective dated. If the administrator changes the effective dated template for that page, the definition of the page does not change, however. The template is primarily used to define the structure and layout of the page, not the content of the page.

---

## **Defining Objective Structures**

This section discusses how to:

- Set up objective plans.
- Define objective sections.
- Define objective templates.

## Pages Used to Define Objective Structures

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Objective Plan	EPO_OBJ_PLAN	Setup HRMS, Product Related, ePerformance, Objective Structure, Objective Plan, Objective Plan	This page enables you to define at a high level a year or the name of a plan to which you want to link objective pages. The objective plan also identifies the hierarchy method. For department hierarchies, the objective plan identifies the tree that is needed to link organizational objectives pages for a particular period to a predefined hierarchy that is created in Tree Manager.
Objective Section Definition	EPO_SECTN_DEFN	Setup HRMS, Product Related, ePerformance, Objective Structure, Objective Section Definition, Objective Section Definition	Define the sections that you want to include on the Objective Template Definition page.
Objective Template Definition	EPO_TMPL_DEFN	Setup HRMS, Product Related, ePerformance, Objective Structure, Objective Template Definition, Objective Template Definition	This page is used to define the layout of the Objective pages. You can also specify which sections will be included and what the sections will look like.

## Setting Up Objective Plans

Access the Objective Plan page (Setup HRMS, Product Related, ePerformance, Objective Structure, Objective Plan, Objective Plan).

## Objective Plan

Objective Plan: 2009

Objective Plan Detail

\*Status:

\*Description:

Short Description:

\*Begin date:        \*End Date:

\*Hierarchy Method:

Department Hierarchy Setids

*Set ID	*Tree Name	+	-
<input type="text" value="AUS01"/> 🔍	<input type="text" value="DEPT_SECURITY"/> 🔍	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="BEL01"/> 🔍	<input type="text" value="DEPT_SECURITY"/> 🔍	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="SHARE"/> 🔍	<input type="text" value="DEPT_SECURITY"/> 🔍	<input type="button" value="+"/>	<input type="button" value="-"/>

Objective Plan Page

**Status** Select the status of the objective plan. The values are *Active* and *Inactive*. The default is *Active*.

**Description** Enter a detailed description of the plan.

**Short Description** Enter a short description of the plan. The systems enables you to enter a maximum of 10 characters.

**Begin Date and End Date** Enter the beginning and ending dates of the plan.

**Hierarchy Method** Select either *Department* or *Position*. If you select *Department*, the system displays a group box that allows you to enter setIDs and tree names that are associated with the department.

**Department Hierarchy Setids**

**SetID** Select the setID that is associated with the department that you want to add to the objective plan.

**Tree Name** Select the name of the tree that is defined for that setID.

## Defining Objective Sections

Access the Objective Section Definition page (Setup HRMS, Product Related, ePerformance, Objective Structure, Objective Section Definition).

**Objective Section Definition**

Section Type: K-PROFIT

Section Definition Detail Find | View All First 1 of 1 Last

Effective Date: 01/01/1980 \*Status: Active

\*Description: Profitability

Short Description: Profit

**Items**

Enable Items Content Type: Business Objectives

Free-Form Allowed [Define Content Group](#)

Description

Measures

Percentage Completed

Item Status Status Definition:

Due Date

Align Items Aligned To: Any Section

**Sub-Items**

Enable Sub-Items Content Type:

Free-Form Allowed

Description

Objective Section Definition page

**Section Type** The entry in this field displays on the Objective Section Definition page.

**Effective Date** The system defaults this field to the current date. You can, however, change the date to one that suits your business needs.

**Status** Select the status of the objective section. The values are *Active* and *Inactive*. The default is *Active*.

<b>Description</b>	Enter the name of the section. The system uses this name as the default section label on the objective pages.
<b>Short Description</b>	Enter a short description of the section. The systems enables you to enter a maximum of 10 characters.
<b>Items</b>	
<b>Enable Items</b>	Select this check box if the section can contain items. When you select this check box, the other fields in this page region are enabled.
<b>Content Type</b>	Select the content type from which content items are pulled when defining the business objectives. Valid options are any content types defined in the content catalog in the Manage Profiles business process.
<b>Define Content Group</b>	Click this link to display an additional page where you can enter a content group type and content group.
<b>Free-Form Allowed</b>	Select to enable users to add items that are not stored in the content catalog to the section when displayed on an objective page. The system assigns a unique identifier to each free-form item that is added. These items are not stored for reuse.
<b>Description</b>	Select to enable the description that is defined for the item to appear on objective pages.
<b>Measures</b>	Select to enable the Measurement field to be displayed as an item on objective pages.
<b>Percentage Completed</b>	Select to enable the Percent Complete field to be displayed as an item on objective pages.
<b>Item Status and Status Definition</b>	Select to enable the Status field to be displayed on objective pages. When you select this check box, the system activates the Status Definition field.  The system displays the prompt list names from the custom list values associated with the Item Status (EP_ITEM_STATUS) field. You can set up additional prompt lists for this field in Profile Management (Setup HRMS, Product Related, Profile Management, Content Catalog, Customer List Values).
<b>Due Date</b>	Select to enable users to enter a due date for items that are displayed on objective pages.
<b>Align Items and Aligned To</b>	Select to enable the Alignment functionality. If you select the Align Items check box, the system makes the Aligned To field active. Select a section from the drop down list box, or <i>Any Section</i> to align items to any section on objective pages.

**Sub-Items**

<b>Enable Sub-Items</b>	Select to enable sub-items on the objective pages. When you select this check box, the other fields in this page region are also enabled.
<b>Content Type</b>	Select the content type (Profile Management) that will be used to obtain the sub-items. The system only displays sub-items that have a child relationship to the item content type in the content catalog.
<b>Free-Form Allowed</b>	Select to enable users to add free-form (non-coded) sub-items to this section.
<b>Description</b>	Select to enable users to have the description for the sub-item appear on objectives pages.

**Defining Objective Templates**

Access the Objective Template Definition page (Setup HRMS, Product Related, ePerformance, Objective Structure, Objective Template Definition, Objective Template Definition).

### Objective Template Definition

Objective Template: KCORP

Objective Template Definition Find | View All | First 1 of 1 Last

\*Effective Date: 01/01/1980 \*Status: Active

\*Description: Corporate Objectives Template

Short Description: Corporate

---

**Page Details**

Default Title: 2009 Business Objectives  Add Dept/Postion to Title

Enable Comments Switch

Include Picture  Picture Name  Picture Title

---

**Sections** Find | View All | First 1 of 3 Last

\*Section: Customer Loyalty \*Display Order: 10

**Items**

Enable Items Content Type: Business Objectives

Free-Form Allowed [Define Content Group](#)

Description

Measures

Percentage Completed

Item Status Status Definition:

Due Date Aligned To: Customer Loyalty

Align Items

---

**Sub-Items**

Enable Sub-Items Content Type:

Free-Form Allowed

Description

Objective Template Definition page

- Effective Date**                      The system defaults this field to the current date. You can, however, change the date to one that suits your business needs.
  
- Status**                                Select the status of the objective template. The values are *Active* and *Inactive*. The default is *Active*.
  
- Description**                         Enter the full name of the template.
  
- Short Description**                 Enter a short description of the template. The systems enables you to enter a maximum of 10 characters.

## Page Details

<b>Default Page Title</b>	Select to enable a default page title to be entered on the template. When selected, the system enables the Page Title field.
<b>Page Title</b>	Enter the page title. This entry will be the title the system uses when the page is created. The owner or administrator can enter the page title on objective pages when they are updating the content, whether or not a default page title is entered on the template.
<b>Add Dept/Position to Title</b>	Select this check box to append the department or position name to the title entered in the Page Title field. In the example here the page name for <i>Corporate Accounting</i> would be <i>2009 Business Objectives for Corporate Accounting</i> .
<b>Enable Comments Switch</b>	Select to make a comments section available in the header section on objective pages. The administrator or page owner can then enter the information into this field when they are updating an objectives page.
<b>Include Picture</b>	Select to enable a space for a picture on objective pages. When the system renders an objective page in view-mode only, it inserts a picture of the objective page owner.
<b>Picture Name</b>	Select to enable a space for the name of the person in the picture. The system uses the picture stored on the Employee Photo page (Workforce Administration, Personal Information, Citizenship, Identification Data, Employee Photo).
<b>Picture Title</b>	Select to enable a space for the title of the person in the picture.

## Sections

<b>Section</b>	<p>Select the sections that will be used in objective pages.</p> <p>This drop-down list box includes all the objective sections that have been defined as of the effective date on the Objective Template page. Once you select a section, the system refreshes the page and defaults the section definition parameters into the template.</p> <p>The administrator can modify the parameters as needed on the template. The system does not modify the section definition when changes are made on the template. These changes affect that template only.</p>
<b>Display Order</b>	<p>For each section, use a number to indicate the order in which the section should be displayed on objective pages.</p> <p>The system displays the sections in ascending order. Therefore, the lowest number section is displayed first on the page. The default value for the first section entered should be 10. Each time you enter a new section, the system defaults the next value by incrementing the highest value by tens.</p>

**Items**

<b>Enable Items</b>	Select this check box if the section can contain items. When you select this check box, the other fields in this page region are enabled.
<b>Content Type</b>	Select the content type from which content items are retrieved when defining business objectives. Valid options are any content types defined in the content catalog in the Manage Profiles business process.
<b>Content Group Type</b>	Click this link to display an additional page where you can enter a content group type and content group.
<b>Free-Form Allowed</b>	Select to enable users to add items that are not stored in the content catalog to this section of objective pages. The system assigns a unique identifier to each free-form item that is added. These items are not stored for reuse.
<b>Description</b>	Select to enable the description that is defined for the item to appear on objective pages.
<b>Measures</b>	Select to enable the Measurement field to be displayed as an item on objective pages.
<b>Percentage Completed</b>	Select to enable the Percent Complete field to be displayed as an item on objective pages.
<b>Due Date</b>	Select to enable users to enter a due date on objective pages.
<b>Align Items and Aligned To</b>	Select to enable the Alignment functionality. If you select the Align Items check box, the system makes the Aligned To field active. Select a section from the drop down list box, or <i>Any Section</i> to align items to any section on objective pages.

**Sub-Items**

<b>Enable Sub-Items</b>	When you select this check box, the other fields in this page region are enabled.
<b>Content Type</b>	Select the content type (Profile Management) that will be used to obtain the sub-items. The system only displays sub-items that have a child relationship to the item content type in the content catalog.
<b>Free-Form Allowed</b>	Select to enable users to add free-form (non-coded) sub-items to this section.
<b>Description</b>	Select to enable users to have the description for the sub-item appear on the objective pages.

## Configuring Email Notifications Using the ePerformance Installation Table

This section provides an overview on email notifications and discusses how to configure email notifications.

### Understanding Email Notification Configuration

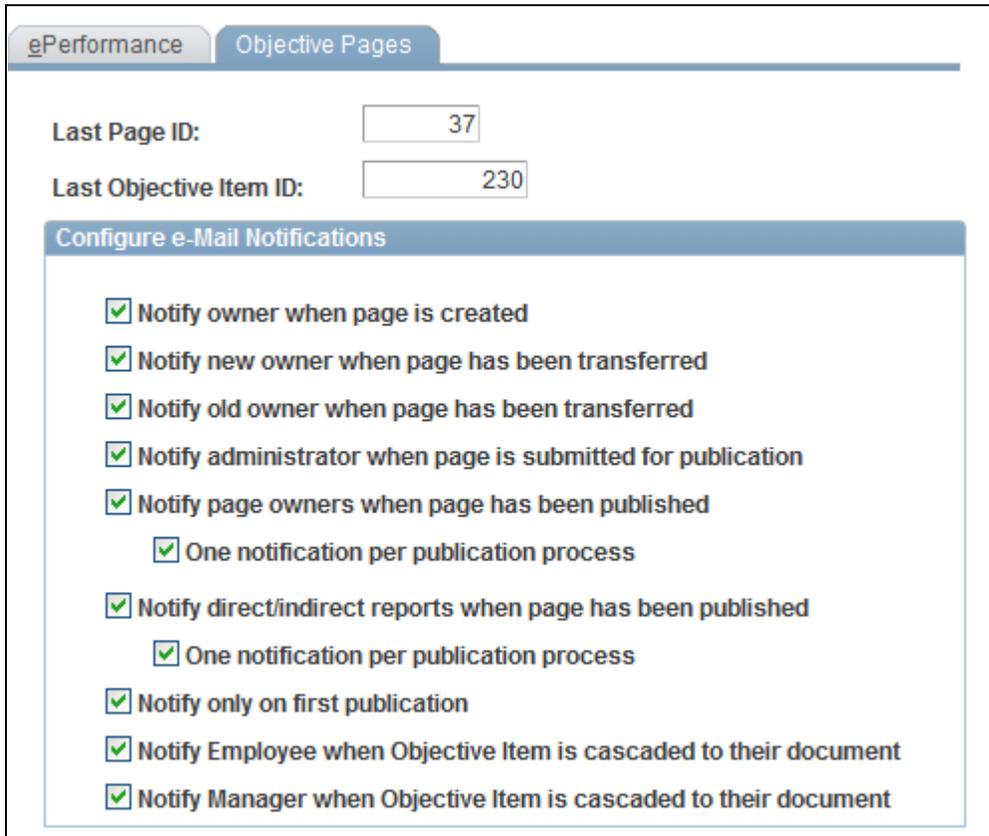
Before you create the objective pages from the templates, you need to define the email notifications that will be sent when various steps in the business process are triggered. To enable this functionality, you need to configure email notification options on the ePerformance General Settings - Objective Pages page. On this page the system lists the email notification options that a user can select to enable certain functionality. The system selects all notification options as the default.

### Page Used to Configure Email Notifications for Objective Pages

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Objective Pages	EP_INSTALL_OBJ	Setup HRMS, Install, Product and Country Specific, ePerformance General Settings, Objective Pages	Define what email notifications that will be sent when various steps in the business process are triggered

### Configuring Email Notifications for Objective Pages

Access the Objective Pages page (Setup HRMS, Install, Product and Country Specific, ePerformance General Settings, Objective Pages).



Objective Pages page

**Last Page ID**

Enter the number from which the system should begin generating page IDs. The system automatically generates the page ID by adding 1 to the Last Page ID.

---

**Warning!** Entering a value that is lower than the value that appears can cause unpredictable results.

---

**Last Objective Item ID**

Enter the number from which the system should begin generating objective item IDs. The system automatically generates the objective item ID by adding 1 to the Last Objective Item ID.

---

**Warning!** Entering a value that is lower than the value that appears can cause unpredictable results.

---

**Notify owner when page is created**

Select to send an email notification to the business objective owner when the page is created and an owner is assigned.

**Notify new owner when page has been transferred**

Select to send an email notification to the business objective owner to whom the page has been transferred.

**Notify old owner when page has been transferred**

Select to send an email notification to the old business objective owner that the page has been transferred to a new owner.

<b>Notify administrator when page is submitted for publication</b>	Select to send an email notification to the administrator letting him or her know that the page is ready and waiting to be published.
<b>Notify page owners when page has been published</b>	Select to send email notifications to the business objective page owners that have access to the published page. Typically these individuals will need to update their pages and link their objectives to the pages above them that have already been published.
<b>One notification per publication process</b>	Select to bundle the requests and send only one notification to the recipient, even if there are multiple pages in the process for which they could be notified.
<b>Notify direct/indirect reports when page has been published</b>	Select to send email notifications to employees who are direct and indirect reports that have access to the published page. Typically these individuals will need to update their ePerformance document and link their objectives to the objective pages above them that have already been published.
<b>One notification per publication process</b>	Select to bundle the requests and send only one notification to the recipient, even if there are multiple pages in the process for which they could be notified.
<b>Notify only on first publication</b>	Select to send email notifications to recipients only on the first publication of the business objective page.
<b>Notify Employee when Objective Item is cascaded to their document</b>	Select to send an email notification to the employee when an objective item has been cascaded down to their performance document.
<b>Notify Manager when Objective Item is cascaded to their document</b>	Select to send an email notification to the manager when an objective item has been cascaded down to the performance documents of their employees.



## Chapter 7

# Modifying Evaluation Criteria

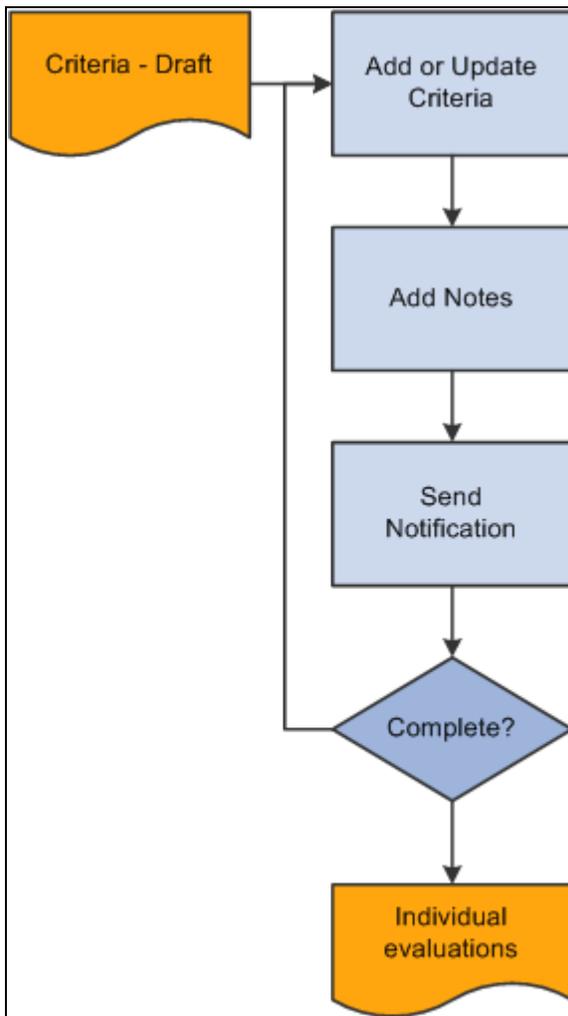
This chapter provides an overview of evaluation criteria modification and document audits, lists prerequisites, and discusses how to modify evaluation criteria.

---

## Understanding Evaluation Criteria Modification

The criteria document that is generated from the document template contains the evaluation criteria. The Establish Criteria step enables a manager, an employee, or both to tailor the evaluation criteria for the employee prior to generating evaluations.

This diagram shows the process for modifying evaluation criteria during the Establish Criteria step:



Establish criteria process showing the steps for modifying evaluation criteria

Depending on the role's capabilities as defined on the document template, evaluators can make these modifications to the criteria document:

- Add items:
  - Add predefined (coded) items and sub-items from the content catalog.
  - Add free form items and sub-items.
  - Copy items from the manager's document.
  - Copy items from business objectives.
- Delete criteria.

You cannot delete criteria if they are identified as mandatory on the template.

- Update criteria.

The criteria details that you can edit during the Establish Criteria step depend on whether or not the items are defined as mandatory and whether or not the items are coded, as shown in this table:

<b><i>If the item is</i></b>	<b><i>Editable Fields for Coded Items</i></b>	<b><i>Editable fields for Not Coded (Free From) Items</i></b>
Mandatory	Status Percent Complete Target Rating	Status Percent Complete Target Rating
Not Mandatory	Supports Critical Ownership Due Date Reminder Date Status Percent Complete Target Rating	Title Description Measurement Supports Critical Ownership Due Date Reminder Date Status Percent Complete Target Rating

Add items such as goals, responsibilities, competencies, or user defined content items to a section. You can add free-form items or select predefined (coded) items from a prompt table. You can also add free form subitems or select predefined subitems for items that are already in the Establish Criteria document.

When you are satisfied with the document criteria, a designated person completes the document. You can generate individual evaluations, by role, from a completed criteria document.

Either a manager or an employee can add performance notes during the Establish Criteria step. These notes are linked to the section and item to which they apply. Later in the process, the person that entered a note can access the note to review it, update it, or include it in their section or item comments.

### ***Learning Section***

If a learning section is added to the template, the system selects all learning in the Learning Management system for the employee that meets this criteria:

- Learning type equals *Activity, Program, or Supplemental*.
- Status equals *Planned, Enrolled, In Progress, or Completed*.
- Status date falls within the evaluation begin and end dates.

Only the administrator, manager, and employee can view this section. Links within the section open the Learning Management system in a separate window where the user can search for learning or review detailed information about the learning in which the employee is enrolled. The Search for Learning link is not available for documents with a status equal to *Complete*.

**See Also**

[Chapter 3, "Setting Up Document Templates," page 21](#)

[Chapter 9, "Entering Comments and Ratings on Evaluations," Entering Performance Notes, page 163](#)

---

## Understanding Document Audits

PeopleSoft delivers three document audits:

1. Document Level audits – This audit records the date, time, and name of the person who performed an action on the document; for example transfer, cancel, complete, acknowledge and so on. Audits at the document level are always turned on; you do not need to select the PS Audit Enabled check box on the ePerformance: General Settings page. Audit information is displayed in the Audit History group box near the bottom of the page when you are establishing criteria or entering evaluation information on an ePerformance document.
2. Item Level audits – This audit records the date, time, and name of the person who created or modified an item on an ePerformance document. Audits at the item level are always turned on; you do not need to select the PS Audit Enabled check box on the ePerformance: General Settings page. Audit information is displayed at the item level near the bottom of the section when you are establishing criteria or entering evaluation information on an ePerformance document.
3. Detailed Item History audits: – This audit is controlled by a database trigger and is delivered turned off. To enable this audit select the PS Audit Enabled check box on the ePerformance: General Settings page . In addition to selecting this check box, you must also use Application Designer to turn on the audits that you want to use. Select the Audit fields in the Record Field Properties dialog box for the EP\_APPR\_B\_ITEM object.

When this audit is enabled, the system displays the Modification History link on document pages used for establishing criteria data. Users can click this link to access the Modification History page (EP\_ITEM\_MOD\_HISTRY), which displays before and after values by field name.

**See Also**

*Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer Developer's Guide, Creating Record Definitions, Setting Record Field Properties, Setting Record Field Use Properties*

[Chapter 2, "Setting Up ePerformance," Defining System Settings, page 8](#)

---

## Prerequisites

Before you modify evaluation criteria, complete the following tasks:

1. Activate the establish criteria process.

Select the Establish Criteria check box on the Template Definition - General page.

2. Define the rules for the establish criteria process.

Complete the fields in the Establish Criteria group box on the Template Definition - Process page.

3. Activate the ability to add, update, delete, copy objectives and copy manager items to the <document type> Criteria document for each specific role .

Select the appropriate check box in the Item tab on the Template Definition - Structure page.

---

## Modifying Evaluation Criteria

This section lists the pages used to modify evaluation criteria and discusses how to:

- Modify evaluation criteria.
- Add a <Section Name>
- Copy items from business objectives.
- Copy items from manager documents.

---

**Note.** The navigation paths and page documentation in this section refers to modifying the Competencies section of an evaluation document. All sections on a document work similarly and use the same page formats. For example, if a document has both a Goals and a Competencies section, the Add Goal page and the Add Competency page function in a similar way.

---

## Pages Used to Modify Evaluation Criteria

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Current Performance Documents Current Development Documents	EP_APPR_SELECT	<ul style="list-style-type: none"> <li>• Manager Self Service, Performance Management, Performance Documents, Current Documents, Current Performance Documents</li> <li>• Self Service, Performance Management, My Performance Documents, Current Documents, Current Performance Documents</li> <li>• Manager Self Service, Performance Management, Development Documents, Current Documents, Current Development Documents</li> <li>• Self Service, Performance Management, My Development Documents, Current Documents, Current Development Documents</li> </ul>	Select the document for which you want to modify evaluation criteria.
Document Details	EP_APPR_DETAIL	Select a document on the Current Performance Documents or Current Development Documents pages.	View the status of the evaluation document and select actions to perform.
<document type> Criteria	EP_APPR_BASE1	Click the Edit link in the Establish Criteria row on the Document Details page.	Modify performance or development criteria.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Add a <section name>	EP_APPR_EDIT3	Select the Add <section name> link for any item that is listed on the Performance Criteria or Development Criteria pages	Select whether you want to add a free-form or a predefined competency to the evaluation criteria specified on the document template.  <b>Note.</b> There are also 2 other ways to add items that must be mentioned: Copy items from business objectives and copy items from manager documents.
Add a <section name>	EP_APPR_EDIT4	Select Add predefined <section name> on the Add a <section> page and then click Next.	Search for a predefined competency to add to the evaluation criteria specified on the document template.
Add a <section name> <section name> Detail	EP_APPR_EDIT5	<ul style="list-style-type: none"> <li>Select Add your own &lt;section name&gt; on the Add a &lt;section name&gt; page and then click Next.</li> <li>Click the Edit Details link on the Performance Criteria or Development Criteria pages associated with the item that you want to update.</li> </ul>	Add a free-form item to the evaluation criteria specified on the document template or modify a competency. This page is also used to modify any item that was previously added using any of the four methods for adding an item to the document.
Copy From Business Objectives	EP_APPR_EDIT9	On the Add a <section name> page, select the Copy goal from Business Objectives radio button and then click Next.	Copy goals from established business objectives into a performance or development document.
Copy From Manager Document	EP_APPR_EDIT9	On the Add a <section name> page, select the Copy <item> from My Document radio button and then click Next.	Copy goals, responsibilities, competencies and other items from the manager's document into a performance or development document.
Add a <section name> Behavior	EP_APPR_EDIT6	Click the Add Behavior link for any item that is listed on the Performance Criteria - Draft or Development Criteria - Draft pages.	Select whether you want to add a free-form or a predefined sub-competency to the evaluation criteria specified on the document template.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Add a <section name> Behavior	EP_APPR_EDIT7	Click Add predefined behavior on the Add a <section name> Behavior page and then click Next.	Search for a predefined behavior to add to the sub-item specified on the document template.
Add a <section name> Behavior Edit <section name> Behavior	EP_APPR_EDIT8	<ul style="list-style-type: none"> <li>Select Add your own behavior on the Add a &lt;section name&gt; Behavior page and then click Next.</li> <li>Click the Edit Details link on the Performance Criteria - Draft or Development Criteria - Draft pages associated with the behavior that you want to add.</li> </ul>	Add a free-form behavior to the evaluation criteria specified on the document template or modify a competency.
Delete Confirmation	EO_DEL_CONFIRM	Click the  button next to an item or a behavior for a <section name> on the Performance Criteria or Development Criteria pages.	Confirm that you intend to delete an item or behavior.
Complete/Reopen Confirmation	EP_APPR_MAIN2	Click the Complete or the Reopen button on the Performance Criteria page.	Confirm that you intend to complete or reopen the document.
Performance Notes	HR_NP_NOTE_SRCH	<ul style="list-style-type: none"> <li>Click the  button in the Details group box for any item on the Performance Criteria page.</li> <li>Click the  button in the Details group box for any item on the Development Criteria page.</li> </ul>	Search for performance notes. See <a href="#">Chapter 9, "Entering Comments and Ratings on Evaluations," Entering Performance Notes, page 163.</a>
Performance Notes - Add/Update Notes	HR_NP_NOTE	Click the Add a New Note button on the Performance Notes page.	Add a new performance note to the section.

## Modifying Evaluation Criteria

Access the Performance Criteria page (click the Edit link in the Establish Criteria row on the Document Details page).

## Performance Document - Performance Document

### Performance Criteria

Tina Palisco, Manager-Accounting  
Performance Document: 01/01/2009 - 12/31/2009

You have successfully saved your criteria.

---

Save
Complete

[Return to Document Detail](#)

---

[Expand All](#)
[Collapse All](#)
[Expand Sections](#)

#### Section 1 - Employee Goals

---

Employee Goals will be evaluated by: Employee, Manager, Other, Peer

[Expand](#)
[Collapse](#)

▼ Goal 1: Follow all Accounting Standards

**Description :** Follow all applicable accounting standards are report any issues immediately.

- Due Date : 12/31/2009
- Status: In Progress
- Stretch Goal: No
- Private : No

**Aligns To Objectives:** Maintain Cost Effective Services

● This Objective was modified on 2009-04-07

Created By:	Betty Loocherty	04/13/2010 5:39PM	
Last Modified By:	Betty Loocherty	04/13/2010 5:43PM	<a href="#">Modification History</a>

▶ Goal 2: Effectively Manage Department Expense

▶ Goal 3: Provide Competitive Salary and Benefits to Employees

▶ Goal 4: Provide Internal Customers with Accurate and Timely Reports

[+ Add Goal](#)
[Business Objectives](#)

<document type> Criteria page (1 of 2)

**Section 2 - Competencies**

Competencies will be evaluated by: Employee, Manager, Other, Peer

[Expand](#)      [Collapse](#)

▼ **Competency 1: Organize & present ideas well**

**Description :**   

- Target Rating: 4-Very Good
- Critical: Yes

Created By:	Betty Locherty	04/13/2010 5:41PM	
Last Modified By:	Betty Locherty	04/13/2010 5:43PM	<a href="#">Modification History</a>

▶ **Competency 2: Financial Accounting**

▶ **Competency 3: HR Policies & Procedures**

[+ Add Competency](#)

▼ **Audit History**

<b>Created By:</b>	Betty Locherty	07/17/2009 4:12:23PM
<b>Last Modified By:</b>	Betty Locherty	04/13/2010 5:43:53PM

 
[Return to Document Detail](#)

<document type> Criteria page (2 of 2)

**Note.** This is an example of the Performance Criteria document, the field definitions that follow also apply to the Development Criteria document. The content that appears on the page is determined by the template associated with the document.

- Save**                      Saves the Performance or Document Criteria document.
- Complete**                      Click this button to complete the Evaluation Criteria step. This button is only enabled if you are signed in with the role that can complete this step.  
  
After you complete the Establish Criteria step, you can view the draft criteria document. When you view a completed criteria document, the Complete button changes to Reopen.
- Return to Document Detail**                      Click this link to cancel the changes and return to the Document Details page.

**Reopen**

This button displays if you have completed the establish criteria process.

Click this button to reopen a criteria document that you previously completed.

---

**Note.** After a role evaluation is created or a pending nomination is accepted, you cannot reopen the criteria document. This button no longer appears on the document, unless all pending nominations have been canceled and all evaluations have been deleted.

---

 (view printable evaluation)

Click this icon to display a printable version of the Establish Criteria document.

 (notify)

Click this icon to display the Send Notification page.

**Section # - <section name>**

This section describes the items that are included in the section and the types of employees who can enter ratings and comments for item that is listed.

---

**Note.** The system determines who can perform evaluations on certain sections based upon the role of the user. You assign roles to a section on the Template Definition - Structure page under the Establish Criteria - Role Rules grid.

---

**Item # - <item name>**

This section describes the parameters that were defined in the Items and Sub-Items group boxes on the Template Definition - Structure page under the Rate/Weight tab. You can add or delete items from the sections in the document.

 (performance note)

This icon is available if the Notes check box is selected on the Template Definition - Structure page under the Section tab.

Click the Performance Note icon to display the Performance Notes page.

You can access this note later when you enter comments or rate the item on the evaluation using the Writing Tools feature.

---

**Note.** In Notepad, when you delete an item that is associated with a note, the note is not actually deleted from Notepad. However, since the item doesn't exist on the document, the note is no longer associated with that item.

---

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring and Working with the HR Notepad.

 (edit details)

This icon displays if the update field is selected on the Item tab of the Template Definition - Structure page.

Click the Edit Details icon to display the <section name> Details page and make updates to the item.



(delete)

The Delete icon is available if the if the Establish Criteria step is enabled and the item is not defined as Mandatory on the document template.

Click the Delete icon to remove the item for the page.

**Aligns To Objectives**

Displays the title of the objective to which the item is aligned.



(objective details)

Click this icon to access a new page that lists the details associated with the objective (description and measurement).



(alignment chain)

Select this icon to access the Objective Alignment Chain page where you can compare the manager's objective or corporate objective with your own objective.

**Modification History**

Click this link to access the Modification History page (EP\_ITEM\_MOD\_HISTRY), which displays before and after values by field name.

---

**Note.** The system does not display this link unless you select the PS Audit Enabled check box on the ePerformance: General Settings page. In addition to selecting this check box you must also use Application Designer to turn on the audits that you want to use.

---

**Add <sub-item name>**

This link is available if the document template specifies that the section contains subitems and the Add check box is selected in the Section Roles: Items grid.

Click this link to access the Add a <subitem> page.

The Add a <subitem> page displays one of several formats, depending on how you set up the document template for the section subitem. You can:

- Add predefined (coded) sub-items from the content catalog.
- Add free form subitems.
- Copy items from the manager's document.
- Copy items from business objectives.

**Add <section name>**

The Add link is available if the Add Items - Establish Criteria check box is selected for the section and the Add check box is selected for the role in the Section Roles: Item grid on the document template.

Click this link to access the Add a <section name> page. This page displays one of several formats, depending on how you set up the document template for the section item. You can:

- Add predefined (coded) items from the content catalog.
- Add free form items.
- Copy items from the manager's document.
- Copy items from business objectives.

## Section # - Learning

Use this section to review, add, or delete learning for the employee. This section is available from both the Current and Historical Documents pages.

**Learning Name** Click this link to display the <learning name> Description page in the Learning Management database.

**Search for Learning** Click this link to open either the Learning Objectives page (if the user is the employee) or the Team Member Objectives page (if the user is the manager). In addition, clicking this link transmits the content type items (for example, competencies), target ratings, and actual ratings from the performance review to the Learning Management database.

This information is used to perform a gap analysis for the learner. Any gaps found are added to the appropriate objectives in Learning Management, and to the current learning objectives of the manager or employee. The Learning Objectives page that is displayed includes the newly-added objectives. Employees and managers can search for and add learning corresponding to the objectives by clicking the Find Learning link.

---

**Note.** The proficiency (rating) for the catalog item is compared with the proficiency needed to meet the objective. This comparison is not taken into account, however, when the system displays the learning. The system displays all learning with all proficiency ratings for an objective. If the user is an administrator, they are taken to the Enroll Learners - Find Requestor page.

---

**Refresh** Click to display any newly enrolled or planned learning that includes dates that are within the appropriate date range. If you exit out of the performance review (or the HR application entirely) and then return, the system displays any newly-relevant learning in the Learning section. It is not necessary to click the Refresh button to display a current view of your learning plan.

## See Also

[Chapter 3, "Setting Up Document Templates," Creating Document Templates, page 43](#)

[Chapter 3, "Setting Up Document Templates," Adding Criteria to Sections, page 65](#)

[Chapter 10, "Consolidating Feedback from Evaluators," Working with Writing Tools, page 188](#)

*PeopleSoft Enterprise Learning Management 9.1 PeopleBook, Using the Learning Catalog*

## Adding a <Section Name>

Access the Add a <Section Name> page.

### Performance Document - Annual Review

## Add a Competency

Wendy Kwan, Analyst-Financial  
Annual Review: 01/01/2002 - 12/31/2002

Using the Title search box and the Search button, you may search for competencies to add to your evaluation. Select the check box next to each competency you want to add. When you are finished, select the Save Selected Competencies button to save your entry.

**Search Criteria**

Competency:

Content Group Type:

Content Group:

### Search Results

[Customize](#) | [First](#) [1 of 1](#) [Last](#)

**Competencies**

GL-Payroll Interface

[Select All](#)   [Deselect All](#)

[Return to Performance Criteria](#)

Add a <Section Name> page

---

**Note.** The page shown here is for adding a new competency to a document. The pages for adding goals, responsibilities, and behaviors are similar.

---

**Search Criteria**

**Competency**                      Enter the word or words that you want the system to use to search for competencies.

**Content Group Type**            Select the content group type that you want the system to use for your search. This field is only available if content group types have been defined for the content type (competency).

**Content Group** Select the content group that you want the system to use for your search. This field is only available if content groups have been defined for the content type (competency).

**Search** Click to display the results in the Search Results group box.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Setting Up the Content Catalog."

### **Search Results**

Based on the criteria that you entered or selected in the Search Criteria group box, the system displays the competencies after you click Search. Select the competencies that you want to add to the document and then click Save Selected Competencies.

## **Copying Items from Business Objectives**

Access the Copy from Business Objectives page (On the Add a <section name> page, select the Copy goal from Business Objectives radio button and then click Next).

**Performance Document**

**Copy from Business Objectives**

Cynthia Adams, Corporate Controller  
 Performance Document: 01/01/2009 - 12/31/2009

Below are the Business Objectives for your organization. You can copy any of these Objectives into the document by selecting the checkbox next to the goal and then the copy button or you can search for different objectives by selecting the link Use Different Objectives. To view more details about each objective, select the link on the objective name.

**Business Objectives Criteria**

**Business Objectives:** [2009 Objectives for Corporate Accounting](#) [Find Different Objectives](#)

**Section:** ANY

**Business Objectives** Customize | Find | First 1-7 of 7 Last

Objectives	Section
<input type="checkbox"/> <a href="#">Monitor Outstanding Payables and Receivables Weekly</a>	Profitability
<input type="checkbox"/> <a href="#">Forecast Projected Payables and Receivables Monthly</a>	Profitability
<input type="checkbox"/> <a href="#">Provide Safe Work Environment</a>	Employee Commitment
<input type="checkbox"/> <a href="#">Provide Competitive Salary and Benefits to Employees</a>	Employee Commitment
<input type="checkbox"/> <a href="#">Provide Quality Educational Opportunities</a>	Employee Commitment
<input type="checkbox"/> <a href="#">Record and Deposit Receivables in Timely Manner</a>	Profitability
<input type="checkbox"/> <a href="#">Answer Customer Questions in Timely and Professional Manner</a>	Customer Loyalty

[Select All](#) [Deselect All](#)

[Return to Performance Criteria](#)

Copy from Business Objectives page

Select the objectives that you want to copy and then click Copy. The system returns you to the page from which you started.

## Copying Items from Manager Documents

Access the Copy from Manager Document page (On the Add a <section name> page, select the Copy <item> from My Document radio button and then click Next).

## Performance Document

### Copy from Manager Document

Cynthia Adams, Corporate Controller  
Performance Document: 01/01/2009 - 12/31/2009

Select the check box next to each goal you want to add. When you are finished, select the Copy button to return to the document where you can save your entry.

Manager Document			
Name:	Betty Locherty	Document Type:	PERFORM
Section:	Goals Section	Content Type:	OBJECTIVES
Begin Date:	01/01/2009	End Date:	12/31/2009

Manager Goals Section	Customize   Find    First 1-9 of 9 Last
Employee Goals	
<input type="checkbox"/> <a href="#">Demonstrate Customer Respect and Loyalty</a>	
<input type="checkbox"/> <a href="#">Ensure Customer Satisfaction</a>	
<input type="checkbox"/> <a href="#">Maintain Cost Effective Services</a>	
<input type="checkbox"/> <a href="#">Provide Safe Work Environment</a>	
<input type="checkbox"/> <a href="#">Effectively Manage Corporate Expense</a>	
<input type="checkbox"/> <a href="#">Provide Competitive Salary and Benefits to Employees</a>	
<input type="checkbox"/> <a href="#">Provide Quality Educational Opportunities</a>	
<input type="checkbox"/> <a href="#">Provide Accurate and Timely Financial Reports</a>	
<input type="checkbox"/> <a href="#">Monitor and Control Corporate Spending</a>	

[Select All](#)   [Deselect All](#)

  
    
 [Return to Performance Criteria](#)

#### Copy from Manager Document page

Select the items that you want to copy from the manager's document and then click Copy. The system returns you to the page from which you started.



## Chapter 8

# Nominating and Tracking Multi-Source Participants

This chapter provides an overview of the nomination and tracking process and discusses how to:

- Manage nominations.
- Manage evaluation requests.
- Monitor and view participant evaluations.

---

## Understanding the Nomination and Tracking Processes

This section lists prerequisites and provides an overview of the nomination and tracking process.

### Nomination and Tracking Process Overview

This section discusses these subjects:

- Multi-participant process.
- Nominations.
- Multi-participant evaluations.

#### ***Multi-Participant Process***

The multi-participant process enables individuals other than the manager and employee to provide direct feedback into an employee's performance or development document. Additional roles might include peers, mentors, customers, and other managers.

You select the roles and specify the capabilities of each role on the document template. The options that you select on the document template also control how the manager and employee interact with the process.

This diagram shows the steps of the multi-participant process for document templates and criteria documents:

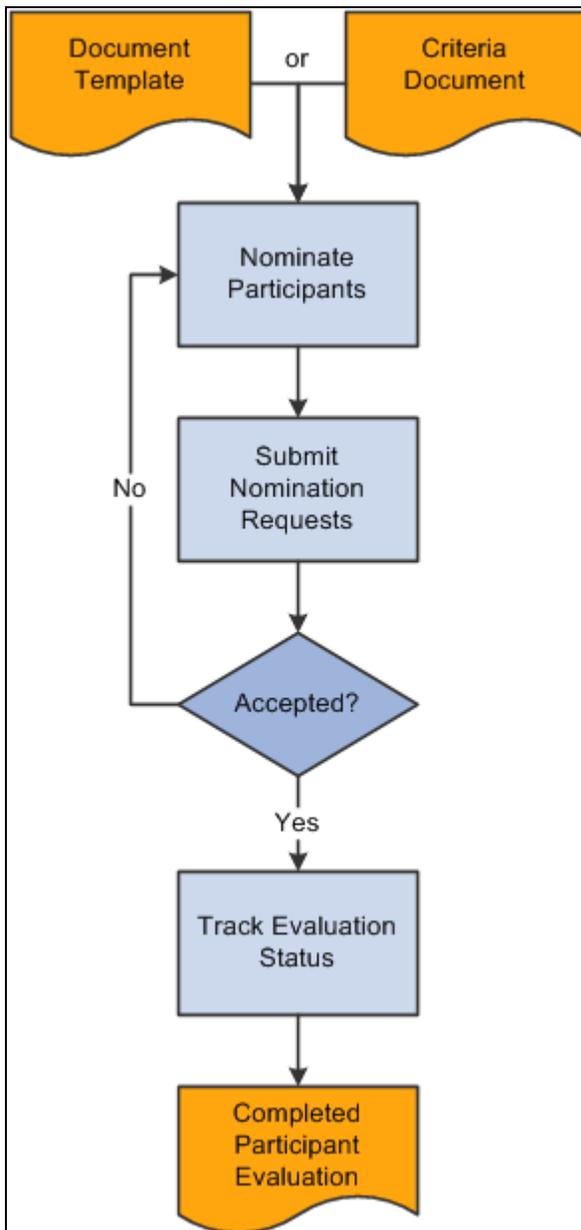


Illustration of the multi-participant process, which enables individuals other than the manager and employee to provide direct feedback into an employee's performance or development document.

The multi-participant process can begin any time after the criteria document is created.

---

**Note.** Because nominees must be able to view the evaluation criteria before deciding whether to accept or decline a nomination, you cannot start the Nominate Participants step until you complete the Establish Criteria step (if the step is enabled on the document template).

---

The actions that managers and employees can perform relative to multiple participants are defined on the Template Definition-Process page in the Nominate Participants and Review Participant Evaluations page regions. These actions include:

- Nominate participants.

Although both the manager and employee can nominate participants if the Updated By check box is selected for their role, only the role that is selected in the Submitted By field can approve and submit the nominations.

- Track the status of nominations and cancel nominations.

A tracker might cancel a nomination if it is pending for too long. The tracker has the ability to resubmit cancelled nominations.

- Review participant evaluations.

This step consists of two functions: tracking participant evaluations and accessing the content of participant evaluations. The ability to perform the two functions is set separately on the Process page of the document template.

If the Accessed By check box is selected for the role, the role can view a list of participants and their evaluation status. If the Viewed By check box is also selected for the role, an active link to the participant evaluation is available to open and view the evaluation itself.

---

**Note.** A user that can open evaluations can also change the due date of the evaluation or send it back for rework. Both of these actions trigger notifications to the participant.

---

Optional features of the nomination process that are controlled on the document template include the ability to:

- Establish a minimum and maximum number of participants.
- Designate that nominee information is anonymous in the tracking nominations feature.
- Designate that feedback from a participant role is anonymous for either the manager and/or employee.

### ***Nominations***

Nominations are not submitted to nominees until the minimum number of participants are nominated and the Establish Criteria step, if applicable, is complete. After a nomination is submitted, it has the status of *Pending*.

Nominees can view their evaluation requests and accept or decline nominations. When a nominee accepts a nomination, the nomination status changes to *Accepted*, and the system generates an evaluation for the nominee.

### ***Multi-Participant Evaluations***

A nominee who accepts a nomination becomes a *participant*. An evaluation, with the specific content and capabilities that are defined for the role on the document template, is created for each participant at the time they accept the nomination.

**See Also**

[Chapter 8, "Nominating and Tracking Multi-Source Participants," Managing Evaluation Requests, page 153](#)

[Chapter 8, "Nominating and Tracking Multi-Source Participants," Monitoring and Viewing Participant Evaluations, page 155](#)

[Chapter 9, "Entering Comments and Ratings on Evaluations," page 159](#)

**Prerequisites**

Before nominating people other than the manager and employee to participate in a performance or development review, you must:

1. Define any multi-participant roles that will be used in the process.
2. Define a document template that is set up for multiple participants.
3. Generate documents from the template.
4. Begin or complete the Establish Criteria step.

**See Also**

[Chapter 3, "Setting Up Document Templates," Creating Document Templates, page 43](#)

---

**Managing Nominations**

This section discusses how to:

- Nominate participants.
- Track nomination status.

## Pages Used to Nominate Participants

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Current <document type> Documents	EP_APPR_SELECT	<ul style="list-style-type: none"> <li>• Manager Self Service, Performance Management, Performance Documents, Current Documents, Current Performance Documents</li> <li>• Self Service, Performance Management, My Performance Documents, Current Documents, Current Performance Documents</li> <li>• Manager Self Service, Performance Management, Development Documents, Current Documents, Current Development Documents</li> <li>• Self Service, Performance Management, My Performance Documents, Current Documents, Current Development Documents</li> </ul>	Select an employee evaluation.
Document Details	EP_APPR_DETAIL	Click a document link on the Current Performance Documents or Current Development Documents page.	View the status of document processes and access detail pages for document steps.
Nominate Participants	EP_APPR_NOM_BUILD	Click the Start link or the Edit link for the Nominate Participants step on the Document Details page.	Nominate participants for multi-source evaluations. On this page, you can view the number of participants that are required for each role, view a list of the nominees you selected, and submit evaluation requests to nominees.

Page Name	Definition Name	Navigation	Usage
Person Search - Simple	HR_PSS_SEARCH	Click the Add Participants to List link on the Nominate Participants page.	Search for prospective participants to add to the nomination list.
Track Nominations	EP_APPR_NOM_TRACK	Click the Start link or the Edit link for the Track Nominations step on the Document Details page.	Track the status of nominations that you submitted.

## Nominating Participants

Access the Nominate Participants page (click the Start link or the Edit link for the Nominate Participants step on the Document Details page).

### Nominate Participants

Adland Chu, Clerk-Payroll Sr  
Developmental Document: 10/01/2004 - 12/31/2004

---

**Participant Role: Customer** Required: 1 Maximum:5

Nominations	
Nominee	Action
Carmichael Espinosa	

[+ Add Participant to List](#)

**Participant Role: Peer** Required: 0 Maximum:3

Nominations	
Nominee	Action
Patrick Seto	
Christelle Stevenson	
Susan Hoinck	

[Return to Document Detail](#)

Nominate Participants page



(delete)

Click the Delete icon to delete a participant from the nomination list. This link is available only when the nominations is not yet submitted to the participant.

**Add Participant to List**

Click this link to access the Person Search - Simple page and search for persons to nominate in the role that is listed. One Add Participant to List link appears for each participant role that is defined on the document template.

**Save**

Click this button to save the participant list.

**Save and Submit**

Click this button to save the participant list and submit the nominations to the nominees. This button only appears if the role you signed in with is enabled to submit nominations on the document template and the Establish Criteria step is complete. Submitted nominations appear on the nominee's My Evaluation Requests page.

**Participant Role Summary**

A summary of the nomination status for each participant role appears preceding the participant list for the role. This summary lists the remaining required and maximum nominations that you must submit and have accepted before the Nominate Participants step is complete.

For example, a document template specifies:

<b>Role</b>	<b>Required</b>	<b>Maximum</b>
Other	0	3
Peer	1	3

If one nomination for the Other role and 3 nominations for the Peer role are submitted, and one peer nomination is accepted and one is declined the role summary would appear like this:

<b>Role</b>	<b>Required</b>	<b>Maximum</b>
Other	0	2
Peer	0	1

**Tracking Nomination Status**

Access the Track Nominations page (click the Start link or the Edit link for the Track Nominations step on the Document Details page).

## Track Nominations

Christelle Stevenson, Manager-Accounting  
Developmental Document: 10/01/2004 - 12/31/2004

---

◆ **Participant Role: Customer** Required: 0 Maximum:3

Nominations		
Nominee	Status	Action
Patrick Seto	Accepted	
Carmichael Espinosa	Accepted	
Danny Johnson	Pending	<a href="#">Cancel</a>

◆ **Participant Role: Peer** Required: 0 Maximum:3

Nominations	
Nominee	Status
Antonio Santos	Accepted
Adland Chu	Accepted
Susan Hoinck	Accepted

[Return to Document Detail](#)

Track Nominations page

***Nominations***

Use this scroll area to view the status of each individual nominee, by role. If the Anonymity check box is selected for a role, the nominee is identified by role and a number, otherwise the nominee's name appears in the list.

- Cancel** Click this link to cancel a nomination request.
- Resubmit** Click this link to resubmit a nomination request. This link appears for nominations that you previously cancelled.
- Decline** Click this link to view the nominee's comments on why they declined. This link appears if the nominee declined the evaluation request.

## Managing Evaluation Requests

This section discusses how to:

- Accept or decline nominations.
- Access multi-participant evaluations.

### Pages Used to Manage Evaluation Requests

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Pending Evaluation Requests	EP_NOM_PENDING_OTH	Self-Service, Performance Management, Other's Performance Documents, Pending Evaluation Requests, Pending Evaluation Requests  Self-Service, Performance Management, Other's Development Documents, Pending Evaluation Requests, Pending Evaluation Requests	Respond to requests to provide performance or developmental evaluations for others.
Decline Evaluation Request Nomination	EP_DECLINE_CONFIRM	Click the Decline button on the Pending Evaluation Requests page.	Enter reasons for declining a nomination.
My Current Evaluations for Others	EP_APPR_OTH_SELECT	<ul style="list-style-type: none"> <li>• Select one or more evaluations and click the Accept button on the Pending Evaluation Requests page.</li> <li>• Self-Service, Performance Management, Other's Performance Documents, Current Evaluations, My Current Evaluations for Others</li> <li>• Self-Service, Performance Management, Other's Development Documents, Current Evaluations, My Current Evaluations for Others</li> </ul>	View a list of the evaluations that you are performing for employees who are not in a reporting relationship to you.

## Accepting or Declining Nominations

Access the Pending Evaluation Requests page (Self-Service, Performance Management, Other's Performance Documents, Pending Evaluation Requests).

### Pending Evaluation Requests

Pending Evaluation Requests		
Name	Document Type	Due Date
<input type="checkbox"/> Betty Locherty	Performance Document	07/30/2009

[Select All](#)   [Deselect All](#)

Accept
Decline

Pending Evaluation Requests page

### Accept

Click this button to accept the evaluation requests that you select.

This action changes the nomination status to *Accepted*, creates the evaluation document, adds it to the Other's Performance Documents - Current Documents list, and transfers the user to this navigation. A notification is also sent to the nominator.

### Decline

Click this button to decline the evaluation requests that you select.

This action displays the Decline Evaluation Request Confirmation page. Use this page to enter a reason for declining the nomination. The system changes the nomination status to *Declined* and sends a notification to the nominator.

## Accessing Multi-Participant Evaluations

Access the My Current Evaluations for Others page (select one or more evaluations and click the Accept button on the Pending Evaluation Requests page).

## My Current Evaluations for Others

You have successfully accepted the selected evaluations.

Current Evaluations for Others				
Employee	Document Type	Begin Date	End Date	Status
Betty Locherty	<a href="#">Performance Document</a>	01/01/2009	06/30/2009	In Progress

[View My Historical Evaluations for Others](#)

My Current Evaluations for Others page

If you access this page after accepting one or more evaluations, the message that appears below the page title is *You have successfully accepted the selected evaluations.*

Click a Document Type link to access the evaluation.

---

## Monitoring and Viewing Participant Evaluations

This section discusses how to monitor participant evaluation status and view the content of participant evaluations.

## Page Used to Monitor and View Participant Evaluations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
<p>Review Participant Evaluations</p>	<p>EP_APPR_PARTIC</p>	<ul style="list-style-type: none"> <li data-bbox="867 331 1177 743"> <p>• Manager Self Service, Performance Management, Performance Documents, Current Documents</p> <p>Select a document on the Current Documents page.</p> <p>Click the View link on the Review Participant Evaluations step.</p> </li> <li data-bbox="867 764 1177 1176"> <p>• Self Service, Performance Management, My Performance Documents, Current Documents</p> <p>Select a document on the Current Documents page.</p> <p>Click the View link on the Review Participant Evaluations step.</p> </li> <li data-bbox="867 1197 1177 1608"> <p>• Manager Self Service, Performance Management, Development Documents, Current Documents</p> <p>Select a document on the Current Documents page.</p> <p>Click the View link on the Review Participant Evaluations step.</p> </li> <li data-bbox="867 1629 1177 1871"> <p>• Self Service, Performance Management, My Development Documents, Current Documents</p> <p>Select a document on</p> </li> </ul>	<p>Track the status of multi-participant evaluations and view the content of participant evaluations.</p>

Page Name	Definition Name	Navigation	Usage
		<p>the Current Documents page.</p> <p>Click the View link on the Review Participant Evaluations step.</p>	

## Reviewing Participant Evaluations

Access the Review Participant Evaluations page (Manager Self Service, Performance Management, Performance Documents, Current Documents). Select a document on the Current Documents page. Click the View link on the Review Participant Evaluations step).

**Current Performance Documents**

---

**Review Participant Evaluations**

Christelle Stevenson, Clerk-Payroll Sr  
Performance Document: 01/01/2004 - 12/31/2004

Performance Document Details			
<b>Employee:</b>	Christelle Stevenson	<b>Job Title:</b>	Clerk-Payroll Sr
<b>Document Type:</b>	Performance Document	<b>Period:</b>	01/01/2004 - 12/31/2004
<b>Manager:</b>	Betty Locherty	<b>Status:</b>	In Progress

Participant Evaluations			
Participant	Role	Status	Due Date
<a href="#">Patrick Seto</a>	Other	Completed	01/31/2005
<a href="#">Carmichael Espinosa</a>	Other	In Progress	01/31/2005
<a href="#">Antonio Santos</a>	Peer	Completed	01/31/2005
<a href="#">Susan Hoinck</a>	Peer	Completed	01/31/2005

[Return to Select Documents](#)

Review Participant Evaluations page

This page is only visible to roles that are enabled to review participant feedback on the document template.

**Participant**

Click a link for a listed participant to view their document.

---

**Note.** If the Anonymity for Manager check box is selected on the document template, the participants are listed by role: Peer1, Peer2, and so forth. If the Anonymity for Manager check box is deselected, the participant names are visible.

---

## Chapter 9

# Entering Comments and Ratings on Evaluations

This chapter provides an overview of evaluation data entry and discusses how to:

- Record preliminary ratings.
- Enter performance notes.
- Update evaluations.

---

## Understanding Evaluation Data Entry

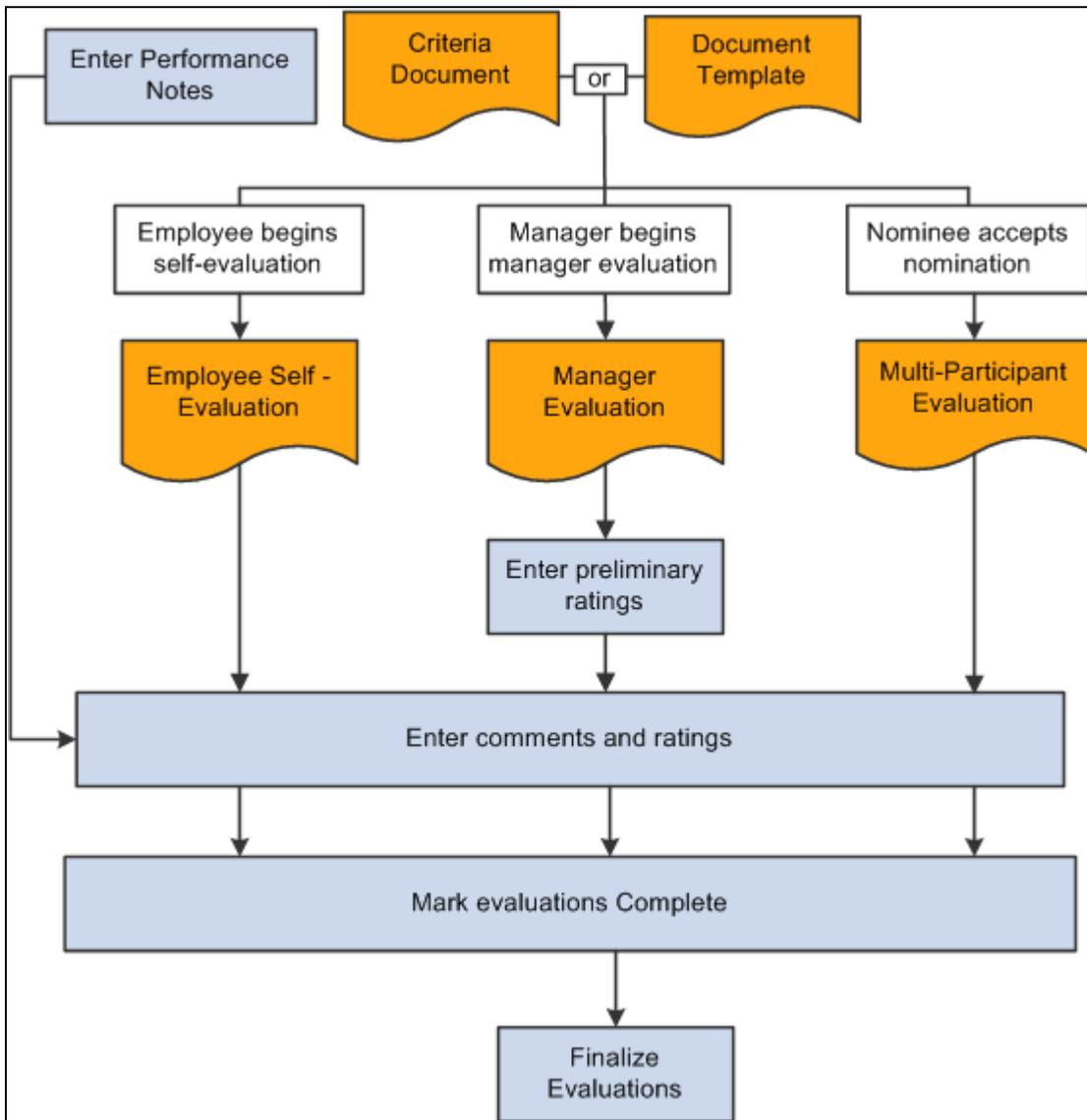
This section discusses these topics:

- Performance and development process.
- Preliminary ratings.
- Performance notes.
- Ratings and comments.
- Advisor tools.
- Finalization activities.

### ***Performance and Development Process***

ePerformance is designed to support the complete performance and development process from planning to evaluation. An enterprise can implement the complete process or just portions of it. This chapter focuses on the part of the process where participants evaluate the employee's performance or development needs against the evaluation criteria.

This diagram shows the flow of the evaluation data entry process, which helps assure that you implement all options from planning to evaluation:



This graphic shows the evaluation data entry process for employee self-evaluations, manager evaluations, and multi-participant evaluations

**Preliminary Ratings**

The capability to enter preliminary ratings for employees is available to managers only. These ratings are entered before the official rating data is entered in the manager's evaluation, and they are not entered on the evaluation—they are entered on the Preliminary Ratings page. This enables the manager to enter preliminary ratings at any time after the document is created, including during the Establish Criteria and Nomination steps.

Only documents that are *In Progress* appear on the Preliminary Ratings page.

Preliminary ratings are used to generate the Ratings Distribution Summary report, which enables managers and HR administrators to compare preliminary ratings with desired and actual rating distributions. Employees cannot see preliminary ratings.

To enable the entry of preliminary ratings, select the Preliminary Rating check box for the Overall Summary section on the document template.

See [Chapter 9, "Entering Comments and Ratings on Evaluations," Recording Preliminary Ratings, page 162.](#)

### **Performance Notes**

Managers and employees can record notes about an employee's performance and accomplishments in two ways:

- During the Establish Criteria step.

The Add Note link appears on a section or item during the Establish Criteria process if enabled on the document template. Notes that are added during this step are directly linked to the section and item to which they apply.

- At any time, by navigating to the Performance Notes page.

Employees can create records of events, activities, and accomplishments that they can later use to complete their performance evaluations. Similarly, managers can record details of an employee's performance for use when they complete the employee's evaluation. These notes are dated, and are available only to the author of a note. In other words, the manager cannot see notes that the employee enters and vice versa.

---

**Note.** There is not a separate page for development notes. The Performance Notes page is used to record any comment. These notes are available for inclusion in either performance or development documents. The Performance Notes page is located under the Performance Management menu item and do not fall under the Performance Documents or Development Documents submenus.

By adding the item ID to the ePerformance Notepad key structure, you can add and store notes at the item level on the Establish Criteria document and then be retrieved them at the item level when you are adding comments to an evaluation using the Writing Tools feature.

---

See [Chapter 9, "Entering Comments and Ratings on Evaluations," Entering Performance Notes, page 163.](#)

### **Ratings and Comments**

The performance document template setup enables you to configure evaluations for each role (employee, manager, and multi-participant) to include only sections, items, and features that are appropriate for the role to evaluate. For example, on a project review, you might include the Goals, Initiatives, Competencies, and Overall Summary sections on the manager and employee evaluations and enable them to enter ratings and comments on all sections. However, you might include only the Competencies and Overall Summary sections on multi-participant evaluations.

To evaluate an employee's performance, participants can enter and update ratings and comments as permitted by the template at any time during the performance period. This evaluation information is visible to employees and managers only after the evaluations are completed.

---

**Note.** A manager can include comments that other evaluators entered on a section or item only if the manager also has comments enabled for the same section and item.

---

See [Chapter 9, "Entering Comments and Ratings on Evaluations," Updating Evaluations, page 167.](#)

**Advisor Tools**

Depending on the capabilities granted to the participant's role on the document template, any evaluation participant might have access to the Development Tips or Results Writer tools. These tools provide suggestions for incorporating comments. Actual usage of these tools most often occurs when the manager role consolidates feedback and finalizes evaluations.

See [Chapter 10, "Consolidating Feedback from Evaluators," Working with Writing Tools, page 188.](#)

**Finalization Activities**

After evaluations are complete, the manager consolidates feedback and ratings into the manager evaluation. The manager conducts a review with the employee (if a review process is required) and submits the evaluation for approval (if an approval process is required).

See [Chapter 11, "Managing Reviews and Approvals," page 205.](#)

**See Also**

[Chapter 3, "Setting Up Document Templates," Creating Document Templates, page 43](#)

[Chapter 7, "Modifying Evaluation Criteria," page 127](#)

**Recording Preliminary Ratings**

This section discusses how to enter preliminary ratings.

**Pages Used to Record Preliminary Ratings**

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Enter Preliminary Ratings	EP_APPR_SELECT	Manager Self Service, Performance Management, Performance Documents, Administrative Tasks, Enter Preliminary Ratings, Enter Preliminary Ratings	Select one or more employees for whom to enter preliminary ratings.
Preliminary Ratings	EP_APPR_PRELIM	Select one or more employees and then click the Continue button on the Enter Preliminary Ratings page.	Enter preliminary ratings for selected employees.

## Entering Preliminary Ratings

Access the Preliminary Ratings page (Select one or more employees and then click the Continue button on the Enter Preliminary Ratings page).

**Enter Preliminary Ratings**

---

**Preliminary Ratings**

You have chosen to enter or update the Preliminary Rating on the document indicated above.  
Enter the new Preliminary Rating in the box below, then select the **Save** button.

Performance Documents					
Employee	Document Type	Begin Date	End Date	Job Title	Preliminary Rating
Adland Chu	Annual Review	01/01/2002	12/31/2002	Clerk-Payroll Sr	Meets Expectations
Angela McKay	Annual Review	01/01/2002	12/31/2002	Auditor-General	Meets Expectations
Wendy Kwan	Annual Review	01/01/2002	12/31/2002	Analyst-Financial	Exceeds Expectations

[Return to Previous Page](#)

Preliminary Ratings page.

**Preliminary Rating** Enter a preliminary rating. The list of ratings from which you select is defined by the rating model that is associated with the Overall Summary section of the document.

### See Also

*PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Setting Up the Content Catalog," Defining Rating Models

---

## Entering Performance Notes

This section discusses how to:

- Access notes.
- Enter performance notes.

### See Also

*PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring and Working with the HR Notepad

## Pages Used to Enter Performance Notes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Performance Notes	HR_NP_NOTE_SRCH	<ul style="list-style-type: none"> <li>• Manager Self Service, Performance Management, Maintain Performance Notes, Performance Notes</li> <li>• Self-Service, Performance Management, Performance Notes, Performance Notes</li> </ul>	Search for and enter performance notes.
Performance Notes - Add/Update Notes Performance Notes - Selected Note	HR_NP_NOTE	Click the Add a New Note button on the Performance Notes or the My Performance Notes page.	Enter a new performance note. You can also view and modify an existing performance note on this page.
Performance Notes - Confirm Delete	HR_NP_MESSAGE	Select one or more notes and then click the Delete button on the Performance Notes or the My Performance Notes page.	Confirm a delete of a performance note.  <b>Note.</b> In Notepad, when you delete an item that is associated with a note, the note is not actually deleted from Notepad. However, since the item doesn't exist on the document, the note is no longer associated with that item.
Person Search - Simple	HR_PSS_SEARCH	Select one or more notes and then click the Transfer button on the Performance Notes or the My Performance Notes page.	Search for and select a recipient manager for a performance note transfer.

## Accessing Notes

Access the My Performance Notes page or the Performance Notes page (Manager Self Service, Performance Management, Maintain Performance Notes, Performance Notes).



## Performance Notes

▼ **Instructions**

Enter the Employee ID of the subject employee in the search criteria, then select the **Search** button. (This list can be filtered further by entering a "Starting Date").

New notes can be added and existing notes can be edited. To add a new note, select on the **Add New Note** button. To edit or access the details of an existing note, select on the note's subject.

▼ **Selection Criteria**

\*Employee ID:

Notes From:   Through:  

**Existing Performance Notes for this Employee** [Customize](#) | [Find](#) | [L2](#)

Select	Subject	Created
<input checked="" type="checkbox"/>	<a href="#">FY09 Q1 Performance</a>	04/23/2009 2:48PM
<input checked="" type="checkbox"/>	<a href="#">Scheduling</a>	04/23/2009 2:47PM

[Select All](#)   [Deselect All](#)

Performance Notes page

---

**Note.** The two Performance Notes pages (manager and employee) work similarly, except that the My Performance Notes page enables employees to search for and enter notes on their own performance and the Performance Notes page enables managers to search for and enter notes on other employees.

---

### **Selection Criteria**

To add or view performance notes for a specific employee, enter an ID and, optionally, a date range. If you do not specify dates, all notes for the employee regardless of date entered appear in the Existing Performance Notes for this Employee grid

---

**Note.** The ID field appears only on the manager version of this page, since employees can only view their own notes.

---

### **Search**

Click to view a list of performance notes that meet the search criteria.

### **Add New Note**

Click to access the Performance Notes - Add/Update Notes page, where you can create a new note.

### Existing Performance Notes for this Employee

This section lists all the performance notes that meet the search criteria.

- Select** Click the check box associated with the note that you want to delete or transfer
- Subject** Click the link to access the Performance Notes - Add/Update Notes page and view or modify the details of the note.
- Delete** Select one or more notes and then click this button to delete the note.
- Transfer** Select one or more notes and then click this button to transfer the note to another manager.

## Entering Performance Notes

Access the Performance Notes - Add/Update Notes page (click the Add a New Note button on the Performance Notes or the My Performance Notes page).

**Performance Notes - Add/Update Notes**

**Instructions**  
 You have chosen to enter or update a Performance Note on the employee indicated below.  
 Enter your comments in the box below, then select the **Save** button.

**Selected Performance Note**

Applications	
Employee ID:	KU0007 Betty Locherty
Created:	02/19/2009 1:13PM
Creator:	Betty Locherty
Updated by:	

Subject: FY Q1 Performance

Note Text: Exceeded expectations. Streamlined FPRC processes. Improved efficiency over 35 percent during quarter

**Save**      < Previous      Next >

[Return to Performance Note Selection](#)

Performance Notes - Add/Update Notes page

**Note.** The note date for new notes is the current date. You cannot change the date. If you are updating an existing note, the system enters the current date and time when you click Save.

<b>Subject</b>	Enter the subject of the note.
<b>Note Text</b>	Enter the text of the note.

---

## Updating Evaluations

This section lists prerequisites and discusses how to:

- Enter and maintain evaluation data.
- Update section item details.

---

**Note.** In this section, a page or field title with a word in brackets indicates that the page takes its name from the context in which it appears.

---

## Prerequisites

Before entering evaluation data as a manager or employee, you must complete the Establish Criteria step, if it is specified on the document template. To enter evaluation data as another participant, you must have received and accepted a nomination to participate in the evaluation.

### **See Also**

[Chapter 7, "Modifying Evaluation Criteria," page 127](#)

[Chapter 8, "Nominating and Tracking Multi-Source Participants," page 145](#)

## Pages Used to Update Evaluations

---

**Note.** The availability and order of these pages depends on the template being used and the role of the participant.

---

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
<role> Evaluation	EP_APPR_MAIN1	<ul style="list-style-type: none"> <li>• Manager Self Service, Performance Management, Performance Documents, Current Documents</li> <li>• Manager Self Service, Performance Management, Development Documents, Current Documents</li> <li>• Self Service, Performance Management, My Performance Documents, Current Documents</li> <li>• Self Service, Performance Management, My Development Documents, Current Documents</li> <li>• Self Service, Performance Management, Other's Development Documents, Current Documents</li> <li>• Self Service, Performance Management, Other's Performance Documents, Current Documents</li> </ul> <p>On the Current Documents page, click the link in the Document Type column for a listed document.</p> <p>On the Document Details page, click the Start link or the Edit link, whichever appears, for the appropriate role evaluation step.</p>	Enter and maintain evaluation data, pursuant to the participant role.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Edit <Section Name>	EP_APPR_M_EDIT5	Click the Edit Detail icon on any Details box on an evaluation.	Update item details such as title, description, due date, level of difficulty, owner, supports, status, reminder date, percent complete, and flags indicating critical items.
View Other Authors Selection	EP_APPR_SEC_ROLES1	Click the View Other Authors link on the <role> Evaluation page.	Select other evaluation authors to view the comments that they entered.
Add <item>	EP_APPR_EDIT3	Click the Add <item>link on the <role> Evaluation page.	Add an item to the section. You can add a coded item, a free-form item, copy items from the Manager Document page, and copy items from the Business Objectives page.
Add a <section name> page	EP_APPR_EDIT4	Click the Add link on the <role> Evaluation page.	Add an item to the section. When searching for items you can also use the Content Group and Content Group Type fields.
Add a <section name> Behavior	EP_APPR_EDIT7	Click the Add Behavior link that appears for a competency item.	Select a behavior to add to the competency or enter a free-form behavior.
Edit <section name> Behavior	EP_APPR_EDIT8	Click a listed behavior link for a competency.	Modify the behavior description for a competency.
Copy From Business Objectives	EP_APPR_EDIT9	On the Add a <item> page, select the Copy goal from Business Objectives radio button and then click Next.	Copy goals from established business objectives into a performance or development document.
Copy From Manager Document	EP_APPR_EDIT9	On the Add a <item> page, select the Copy <item> from My Document radio button and then click Next.	Copy goals, responsibilities, competencies and other items from the manager's document into a performance or development document.

## Entering and Maintaining Evaluation Data

Access the Manager Evaluation, Employee Evaluation, or Peer Evaluation page (Manager Self Service, Performance Management, Performance Documents, Current Documents). On the Current Documents page, click the link in the Document Type column for a listed document. On the Document Details page, click the Start link or the Edit link, whichever appears, for the appropriate role evaluation step).

**Note.** The example shown is from a manager's evaluation.

### Performance Document - Performance Document

## Manager Evaluation

Jill Chancelor, Manager-Payroll  
Performance Document: 01/01/2009 - 12/31/2009

<b>Author:</b>	Betty Locherty	<b>Role:</b>	Manager
<b>Status:</b>	In Progress	<b>Due Date:</b>	03/01/2010
<b>Approval:</b>	Not Required		

Employee Data

<b>Empl ID:</b>	KUL702		
<b>Department:</b>	13120	Payroll	
<b>Years of Service:</b>	12	Years	6 Months
<b>Years of Job:</b>	0	Years	8 Months

[Rating History](#)

Enter ratings and comments for each section in this evaluation, if applicable. Save entries made on the evaluation by selecting the Save button.

  [Return to Document Detail](#)

[Expand All](#)    [Collapse All](#)    [Expand Sections](#)

Manager Evaluation page (1 of 3)

**Section 1 - Employee Goals**

[Expand](#)      [Collapse](#)  
[View Other Authors](#)

**Goal 1: Provide Employees with Accurate and Timely Payroll Checks**

**Description :** Provide Employees with Accurate and Timely Payroll Checks according to each organizations payroll calendar.  

- Due Date : 12/31/2009
- Status:
- Stretch Goal: No

**Aligns To Objectives:**    Ensure Customer Satisfaction  

 This Objective was modified on 2009-04-07

**Rating:**         0.00 

**Comments:**   
[Writing Tools](#)

Created By:      Betty Locherty      07/15/2009 4:10PM

**▶ Goal 2: Provide Accounting with Accurate & Timely Payroll Reports**

**▶ Goal 3: Complete Payroll Runs on Time each Payroll Period**

**▶ Goal 4: Maintain the Payroll System**

**▶ Goal 5: Answer Customer Questions in Timely and Professional Manner**

 [Add Goal](#)      [Business Objectives](#)

**Goals Summary**

**Rating:**         0.00 

Manager Evaluation page (2 of 3)

▶ **Section 2 - Competencies**

---

▼ **Section 3 - Overall Summary**

---

Rating:  

Comments:

[Writing Tools](#) 

---

▼ **Audit History**

<b>Created By:</b>	Betty Locherty	07/15/2009 4:10:18PM
<b>Last Modified By:</b>	Betty Locherty	07/15/2009 4:10:18PM

---

---



[Return to Document Detail](#)

Manager Evaluation page (3 of 3)

Evaluations are divided into sections, with each section containing a different type of content. Sections contain the items and subitems against which an employee's performance is evaluated and can include mission statement, goals and objectives, responsibilities, competencies, learning, employee comments, manager comments, an overall summary, signature lines, or organization-specific sections that you define.

Each *role* evaluation contains header information that identifies the role and the person who is evaluated. The header information also contains instructional text that changes depending on the role. The instructional text is system data that is supplied with PeopleSoft ePerformance, but you can modify this text by using the Text Catalog.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Working with Common Components."

**Rating History** Click a access secondary page that contains rating history information for the employee.

**Save** This button displays on an evaluation when the evaluation status is *In Progress*. Click to save the evaluation and return to it later. The system calculates, according to template rules, all ratings that were entered prior to saving the review to the database.

**Submit for Approval** This button displays if the review process that is selected in the Manager Evaluation region of document template's Process page specifies that an approval is required.

Click to submit the evaluation to the designated approver according to the approval rules.

**Available for Review** This button is available when the review process selected in the Manager Evaluation group box of the document template's Process page specifies that an employee review is required and you have entered all required information

Click to submit the document for review by the employee, according to the review and approval rules.

**Cancel**

Click to cancel the changes you have made to the evaluation.

 (view printable evaluation)

Click this icon to view a printable version of the performance document. Clicking View Printable Evaluation generates an XMLP report that matches the document. The report can include the learning section, eSignature section, employee data, other participants and audit history. Use the browser's Print command to print a hard copy of the document. The eSignature section only exists in the XMLP report, it doesn't appear on the document.

---

**Note.** You must be the employee or an administrator to access the document.

---

 (notify)

Click this icon to access the Send Notification page, where you can enter email addresses and a message to notify other interested parties.

 (view graphical ratings report)

Click to display the Graphical Ratings Report page.

### **Section # – <section name>**

The information that displays in a section depends on the type of section, the special processing associated with the section, and the parameters selected on the Template Definition - Structure page. The system may also display data that was entered on the Template Definition - Content page, or data that was retrieved from the Job Profile Manager (JPM). In some cases you can edit this data.

---

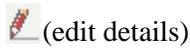
**Note.** For a complete list of fields that may appear in this section, refer to Defining Sections in the Setting Up Document Templates chapter in this PeopleBook.

---

See [Chapter 3, "Setting Up Document Templates," Defining Sections, page 32.](#)

### **Description**

The Description label displays if the Description check box is selected on the Template Definition - Structure page. Content for the Description label displays if data is entered in the JPM\_TEXT1325\_1 field on the Content Items - Items Detail page (Set Up HRMS, Product Related, Profile Management, Content Catalog, Content Items, Item Details).



The Edit Details icon displays on the evaluation if the Update check box is selected for the role in the Section Roles grid, Item tab for the section.

Click to edit the detail information for the item.

See [Chapter 9, "Entering Comments and Ratings on Evaluations," Updating Section Item Details, page 180.](#)



Delete is available if the Mandatory check box is not selected on the Template Definition - Content page.

Click to delete the content item.

---

**Note.** This overrides the value in the Mandatory field on the job profile. If you specify that an item on the job profile is mandatory and do not select this check box, the item is not mandatory on the document.

---

**Measurement**

The Measurement label displays if the Measures check box is selected on the Template Definition - Structure page. Content for the Measurement label displays if data is entered in the JPM\_TEXT1325\_2 field on the Content Items - Items Detail page (Set Up HRMS, Product Related, Profile Management, Content Catalog, Content Items, Item Details).

Measurement describes the criteria for measuring an employee's success at meeting this content item.

For example, if the goal is to reduce customer complaints by 5 percent, the measurement might be: "Based on the number of complaints received by Customer Support through December 31, as compared to complaints made in the previous year." You can change the information for free-form items, as needed.

**Supports <item>**

The Supports <item> label displays if the Supports check box is selected on the Template Definition - Structure page. Content for the Supports <item> label displays if a section is selected in the Link field on the Template Definition - Structure page and a content item is selected for the Supports field on the Template Definition - Content page.

This field is used to link goals to initiatives, or competencies to responsibilities, initiatives or goals

**Ownership**

The Ownership label displays if the Ownership check box is selected on the Template Definition - Structure page. Content for the Ownership label displays if *Employee* or *Manager* is selected in the Owned By field on the Template Definition - Content page.

**Reminder Date**

The Reminder Date label displays if the Reminder Date check box is selected on the Template Definition - Structure page. Content for the Reminder Date label displays if a date is entered in the Reminder Date field on the Template Definition - Content page.

**Due Date**

The Due Date label displays if the Due Date check box is selected on the Template Definition - Structure page. Content for the Due Date label displays if a date is entered in the Reminder Date field on the Template Definition - Content page.

<b>Target Rating</b>	The Target Rating label displays if the Target Rating check box is selected on the Template Definition - Structure page. Content for the Target Rating label displays if a target rating is selected in the Target Rating field on the Template Definition - Content page.
<b>Status</b>	The Status label displays if the Status check box is selected on the Template Definition - Structure page.
<b>Percent Complete</b>	The Percent Complete label displays if the Percentage Completed check box is selected on the Template Definition - Structure page.
<b>Critical</b>	The Critical label displays if the Critical check box is selected on the Template Definition - Structure page. <i>Yes</i> or <i>No</i> displays as the content for the Critical label if it is defined on the Template Definition - Content page.
<b>Average Rating</b>	The Average Rating label displays if the View Average Rating check box is selected on the Template Definition - Process page.
 (view graphical rating)	The View Graphical Rating icon displays if the View Average Rating check box is selected on the Template Definition - Process page. Click to display the Average Ratings page.
 (rating explanation)	Click to display a page that provides an explanation of the rating. From this page you can select the rating that best describes the employee's proficiency. The system displays either the description entered on the Rating Explanation page or the proficiency description entered on the Content Item page. If the system finds there is a rating explanation and a proficiency description, the proficiency description has precedence over the rating explanation.
<b>Rating</b>	This field displays if the Rate check box is selected for the section and the applicable Rate Section, Rate Item, or Rate subitem check box is selected in the Section Roles grid, Rate/Weight tab.  View or enter ratings. The action that is permitted depends on the level (subitem, item, section) where the field occurs if calculation is enabled in the document template, and the user actions that the template definition permits.  For example, at the overall summary and section summary levels, the rating field is read-only unless the role has permission to override system-calculated ratings or calculate field was not enabled on the document template. <hr/> <b>Note.</b> In the Rating Display field on the Template Definition - Structure page you can select <i>Radio Buttons</i> to display ratings as radio bullets or you can select <i>Drop-Down Box</i> to display ratings in a drop-down list. <hr/>
 (calculate ratings)	This icon is available in the <content item> Summary group box and Overall Summary section. Click to calculate ratings.

**Override**

Click to override a system-calculated rating or remove an existing override. The button appears at the following levels on the performance review page, depending on the template definition:

- At the item level within a section, to override the system-calculated average of individual subitem ratings.
- At the section summary level to override the system-calculated average of individual item ratings.
- At the overall performance review summary level, to override the system-calculated average of individual section ratings.

---

**Note.** An override that you enter remains in place until you remove it. To have the system recalculate the rating, remove the override.

---

**Weight**

The Weight field displays if the Weight check box is selected for the section and the applicable Weight Section or Weight Item check box is selected in the Section Roles grid, Rate/Weight tab.

Enter the weight of an item relative to the other items in the same section or relative to other sections in the evaluation.

---

**Note.** The sum of the weights for all items in a section or all sections in a document, must equal 100 percent in the manager's document.

---

**Comments**

The Comments field displays if the Comments check box is selected in the Section Roles grid, Section tab or Item tab.

Enter free-form text to describe an employee performance relative to the corresponding item or section. The comments section always has access to a spell checker and optionally has access to writing tools. This field can appear at the item level or the section summary level.

**View Other Authors**

This link appears if the View Other check box is selected in the Section Roles grid, Section tab.

Click this link to view the evaluation data that other roles entered on this section for the employee.

 (spell check comments)

Click to check the spelling of the text entered in the Comments field.

<b>Writing Tools</b>	<p>This link displays if the Comments check box and at least one writing tool are selected for the role in the Section Roles grid, Section or Item tab.</p> <p>Click this link to access the Suggested Results page. The Suggested Results page displays a list of text entries that can include Performance Notes, Other Evaluator Comments, Results Writer, and Development Tips statements, and enables you to choose one or more entries for inclusion in the Comments section.</p> <p>The Writing Tools link appears for a role if the role is enabled on the document template to view Results Writer and Development Tips suggestions for the section or item. Any performance notes that the employee or manager recorded from within the Establish Criteria about the employee also appear in this list, but are restricted to the document role. Employees do not see notes that the manager has recorded about them and managers do not see employee notes. The manager can also view comments from other evaluators for the item or section they are evaluating if it was enabled on the document template.</p>
<b>Learning Name</b>	<p>Click this link to display the &lt;learning name&gt; Description page in the Learning Management database. This link appears only in Learning sections.</p>
<b>Add Behavior</b>	<p>Click to add a new behavior.</p> <p>The Add Behavior link displays if Subitems are enabled on the Template Definition - Structure page.</p>
<b>Add &lt;content item&gt;</b>	<p>Click to add a new content item.</p> <p>The Add &lt;content item&gt; link displays if the Add check box is selected on the Section Roles grid, Item tab.</p>
<b>Search for Learning</b>	<p>Click this link to access the Learning Management database. Based on the role of the user, clicking the Search for Learning link opens one of these ELM pages:</p> <ul style="list-style-type: none"> <li>• For employees, it opens the Learning Objectives - Current Objectives (LM_OBJV_LRNR) page.</li> <li>• For managers, it opens the Team Members Objectives - Current Objectives (LM_OBJV_MTM) page.</li> <li>• For administrators, it opens the Enroll Learners - Find Requester (LM_CALL_CENTER_REQ) page.</li> </ul> <p>Only competencies with blank Target Ratings trigger the gap analysis process. Competencies with Target Ratings that are not met are added as learning objectives for the learner without doing a comparison.</p> <hr/> <p><b>Note.</b> This link appears only in Learning sections.</p> <hr/>
<b>Check Language</b>	<p>Click to run the Language Checker tool. This button is available if the Language Checker button is selected on the Template Definition - General page.</p> <p>The Language Checker tool enables you to check a performance review for inappropriate language that is used in the manager's document. When inappropriate words are identified, the Language Checker tool suggests alternative words or phrases that are more acceptable from an organization's perspective.</p>

**Calculate All Ratings** Click to calculate all of the item and section ratings, as well as the overall rating that appears on the performance document. Ratings are not calculated for items, sections, or summaries that are overridden.

The system enables this button if the section has the Rate check box selected on the Template Definition - Structure page and ratings have been entered for sections, items, or subitems.

**Cancel Evaluation** Click to move the current evaluation from a status of *In Progress* to a status of *Cancelled*.

If the template was setup to update Profile Management and a manager cancels the evaluation, the system deletes all evaluations, employees and peers that might have already been sent to the Manage Profiles business process.

If the employee cancels his or her evaluation, the system only deletes his or her evaluation from the Manage Profiles business process.

**Review Held** Click to record the fact that a review of the evaluation was held.

This button displays if the review process specifies that an employee review is required and the employee has reviewed the manager's finalized evaluation.

**Reopen** Click to change the status to *In Progress*.

This button appears for managers and administrators when the evaluation is in the *Complete* status.

**Attachments**

Once you select an attachment and the file is uploaded, the system transfers you back to the document where you can update information about the attachment.

Attachments					
File Name	Description	Attachment Audience	Last Update Date/Time	Uploaded By	
<a href="#">Goals_Q3_09.doc</a>	<input type="text" value="09 Goals"/>	EE and Mg <input type="button" value="v"/>	07/15/2009 5:12:36PM	Betty Locherty	
<a href="#">License_Rev_09.doc</a>	<input type="text" value="Revenue Q3"/>	EE and Mg <input type="button" value="v"/>	07/15/2009 5:12:36PM	Betty Locherty	

[Add Attachment](#)

Attachment group box

**File Name** Displays the name of the file with a link to the file that was uploaded.

**Description** Use this field to enter a description of the file that you uploaded.

**Attachment Audience** The manager can use this field to identify if the file can be viewed and downloaded by the employee and manager or the manager only. Select one of these values:

- EE and Mgr (employee and manager)
- Mgr Only (manager only)

If you select *EE and Mgr*, the file can be viewed and downloaded by the employee, manager, the manager's upward management chain, and the ePerformance administrator. If you select *Manager Only*, the files can only be view by the manager, the manager's upward management chain, and the ePerformance administrator.

**Last Update Date/Time** Displays the date and time the manager uploaded the file to the document.

**Uploaded By** Displays the name of the manager that uploaded the file to the document.



Click to delete the attachments. You can only do this when the document status is *In Progress*.

### ***Audit History***

To support the eSignature section within the manager's version of the document additional fields were added to the document structure to store audit information. When transactions are acknowledged and completed, the system displays fields such as user ID and date and time stamps . Additionally the system stores data when documents are created and updated and by whom.

For Manager Documents these fields are applicable to the Audit History group box:

- Created By
- Created Date and Time
- Last Updated By
- Last Updated Date and Time
- Transferred From
- Transferred Date and Time
- Transferred By
- Transferred Date and Time
- Transferred To
- Transferred Date and Time
- Acknowledged By
- Acknowledged Date and Time
- Completed By

- Completed Date and Time
- Cancelled By
- Cancelled Date and Time
- Reopened Document By
- Opened Document Date and Time

For documents that are accessed by individuals with other roles (employee, customer, peer and other), only these fields are applicable to the Audit History group box:

- Created By
- Created Date and Time
- Last Updated By
- Last Updated Date and Time
- Completed By
- Completed Date and Time
- Cancelled By
- Cancelled Date and Time
- Reopened Document By
- Reopened Document Date and Time

---

**Note.** The system only displays the fields and the associated data when the field is populated. The system does not display information in the Audit History group box for fields that don't have a user ID or date and time stamp. For example, if the document isn't cancelled, the system won't display the Cancelled By field in the Audit History group box.

---

## Updating Section Item Details

Access the Edit <Section Name> page (click the Edit Detail icon on any Details box on an evaluation).

**Performance Document - Annual Review**

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**Edit 601 Competencies**

Jill Chancelor, Manager-Payroll  
Annual Review: 01/01/2009 - 12/31/2009

**Title:** Analytical thinking

**Description:**

- Anticipates obstacles.
- Breaks problems apart systematically
- Makes logical conclusions
- Sees consequences, implications.
- Sees causal relationships, inferences.

**Ownership:** Employee

**Status:** Complete

**Percent Complete:** 100

**Due Date:** 12/31/2009 (example 12/31/2000)

**Reminder Date:** 09/15/2009 (example 12/31/2000)

**Start Date:** 01/01/2009

**End Date:** 12/31/2009

Critical

**Created By:** Template 03/04/2009 12:16PM

**Last Modified By:** Betty Locherty 03/04/2009 12:19PM

[Return to Update 601 Competencies Criteria](#)

Edit <Section Name> page

Use this page to change the evaluation details for the item.

**Note.** The fields that appear on this page will be different based on the items you select and the way that you set up your document template. You can configure the document template to enable an evaluator to change the value of any field except Title, Description, and Measurement. The evaluator can modify these fields only if the item is not coded (stored in a system table). The values that initially appear for detail fields are set on the Content page of the document template.

For a complete list of fields that may appear in this section, refer to Defining Sections in the Setting Up Document Templates chapter in this PeopleBook.

See Chapter 3, "Setting Up Document Templates," Defining Sections, page 32.

**Title** Displays the title of the item.

**Description** Displays a description of the item.

<b>Ownership</b>	Select a value to indicate who is responsible for the item.
<b>Level of Difficulty</b>	The system displays this field if the Level of Difficulty check box is selected on the Template Definition - Structure page. The Level of Difficulty field uses <i>Basic</i> , <i>Intermediate</i> , and <i>Advanced</i> as its values. When an item from the Content Catalog is added, this field displays the level of difficulty associated with that item and you cannot edit the values. If the item is manually added, you can select the level of difficulty unless the item is marked mandatory on the Template Definition - Content page.
<b>Status</b>	Select a value to indicate the status of the item. Possible values are <i>Complete</i> , <i>In Progress</i> , and <i>N/A</i> (not applicable).
<b>Percent Complete</b>	Enter the completion percentage for an item that appears on the performance document.
<b>Due Date</b>	Enter the date when a particular goal or item should be completed.
<b>Reminder Date</b>	Enter a date. This field is used for informational purposes only.
<b>Start Date and End Date</b>	Enter the beginning and ending dates for the item.
<b>Critical</b>	Select this check box to have the word <b>Critical</b> appear in the detail area of the item on the evaluation.

## Chapter 10

# Consolidating Feedback from Evaluators

This chapter provides an overview of consolidating feedback and discusses how to:

- Viewing Evaluation Ratings
- Work with writing tools.

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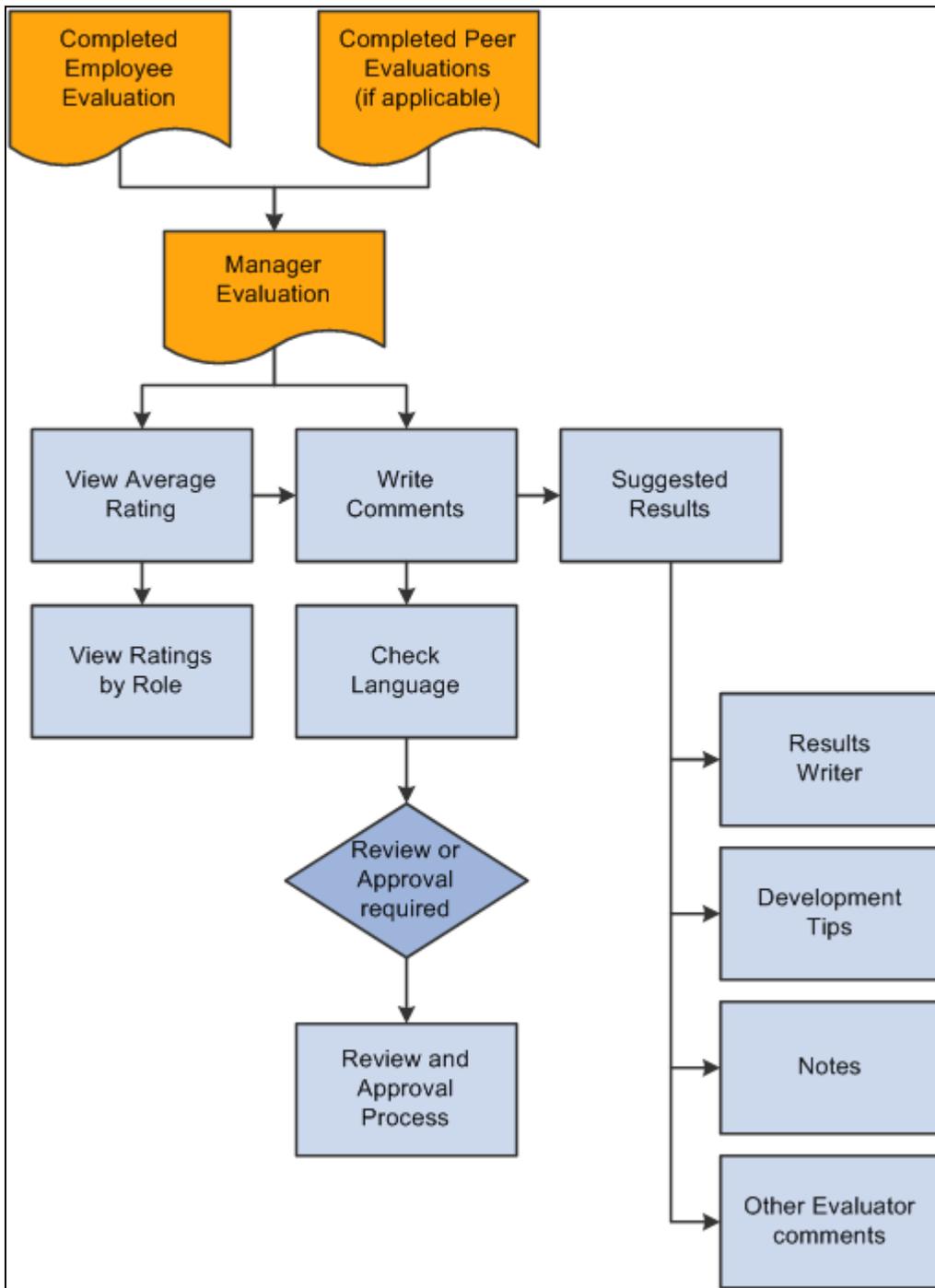
## Understanding Consolidating Feedback

This section discusses:

- Feedback consolidation.
- Ratings.
- View Other Authors.
- Writing Tools.
- Language Checker Tool.
- Reviews and Approvals.

### ***Feedback Consolidation***

This diagram shows the high-level process for consolidating feedback from completed employee, peer, and manager evaluations:



Consolidate feedback process showing how the system integrates feedback from completed employee, peer, and manager evaluations

Although managers can rate items, add comments to their evaluations, and record notes at any time during the evaluation cycle, they must perform additional steps to finalize and complete evaluations. These steps include writing final evaluation comments and conducting reviews and approvals, if required.

## Ratings

Ratings are entered at either the section, item, or subitem level, as defined on the document template. If the document is set up to automatically calculate ratings, ratings from lower levels are averaged and rolled up to the higher levels. The manager rating (calculated or manually entered) on the manager's evaluation is used by the writing tools to select appropriate text.

## View Other Authors

Managers can use this tool to view comments and ratings from evaluators in other roles. This tool is read-only. Other evaluators' ratings and comments appear only if the evaluation status is *Complete*.

To enable this functionality, select the View Other check box for the role and section in the Section Roles grid on the Structure page of the document template.

## Writing Tools

The Writing Tools link accesses the Suggested Results page, which contains text suggestions that assist evaluators in writing comments. These suggestions can come from any of several different sources, provided that as they are enabled for the section or item on the document template.

The Suggested Results page presents the text items that are most directly related to the section and item. You can also select a tool from the available options in the Find Additional Content field to use an advanced search for text that is not directly related to the section, item and rating from which you accessed the writing tools. This enables you to search for text suggestions from any text source that is defined on the document template for the section or item.

These are the possible sources for text suggestions:

- Results Writer

Results writer statements are predefined statements that describe an employee's proficiency for a given competency or sub-competency. These statements appear on the Suggested Results page for competency sections only, but you can locate results statements for other sections by using the advanced search. For example, to find statements for a goal that you know is related to the Communications Skills competency, you can use the advanced search. You can then incorporate the suggestions that apply to the goal into the comments for the goal. You must rate a section or item before suggested results appear.

- Development Tips

Development Tips consist of predefined statements that provide tips on how employees can develop their proficiency. Development tips are related to competencies and sub-competencies, but can apply to other evaluation criteria as well. You must rate a section or item before development tips appear.

- Comments

A manager can view comments that evaluators in other roles entered for the same section and item. Comments from another evaluator appear only if the role's evaluation status is *Complete*.

- If you access the Suggested Results page from an item, all comments from complete evaluations for the item appear.
- If you access the Suggested Results page from a section, only the comments from complete evaluations for the section appear. Comments do not appear at the item level.

- Performance Notes

The performance notes that were entered during the Establish Criteria for the section are available on the Suggested Results page, and are available only to the person who entered the note.

---

**Note.** Employees and managers can also enter notes that are not directly tied to an evaluation. You can search for these notes using advanced search capabilities.

---

### ***Language Checker Tool***

The Language Checker tool alerts managers to inappropriate language that appears in a manager's evaluation and suggests alternative language. It is enabled on the document template for an evaluation as a whole and is not turned off or on at the section or item level.

### ***Reviews and Approvals***

Employee reviews and management approvals are not required in all cases. If they are required, the manager's evaluation is the one that is reviewed and approved, and the status of this document reflects the review and approval status.

### ***See Also***

[Chapter 3, "Setting Up Document Templates," Creating Document Templates, page 43](#)

[Chapter 4, "Setting Up Text for Advisor Tools," page 71](#)

[Chapter 9, "Entering Comments and Ratings on Evaluations," page 159](#)

[Chapter 11, "Managing Reviews and Approvals," page 205](#)

---

## **Viewing Evaluation Ratings**

This section discusses how to view evaluation ratings.

### **Pages Used to View Evaluation Ratings**

<b><i>Page Name</i></b>	<b><i>Definition Name</i></b>	<b><i>Navigation</i></b>	<b><i>Usage</i></b>
Document Detail	EP_APPR_DETAIL	Manager Self Service, Performance Management, Performance Documents, Current Documents, Current Performance Documents  Click a document link.	View a summary of the document's progress and access the manager evaluation.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Manager Evaluation	EP_APPR_MAIN1	Click the Start link or the Edit link on the Manager Evaluation row on the Document Details page.	View section and item ratings.
Average Ratings	EP_AVG_CHART	Click the Details link next to the Average Rating on any section or item on the Evaluation page.	View evaluation ratings by role.
Graphical Ratings Report	EP_360_REPORT	Click the View Graphical Ratings Report link on the Evaluation page.	View a summary report that contains the average ratings chart from every section and item on the evaluation.

## Viewing Evaluation Ratings

Access the Average Ratings page (click the Details link next to the Average Rating on any section or item on the Evaluation page).

**Performance Document - Performance Document**

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## Average Ratings

Christelle Stevenson, Clerk-Payroll Sr  
Performance Document: 01/01/2004 - 12/31/2004

**Section:** Responsibility Section

**Item:** Research and Resolve customer issues

**Average Rating:** Exceeds Expectations 3.50

**Participant Ratings**

Role	Number of Participants	Average Rating
Other	1	3
Peer	2	3.5
Employee	1	4

[Return to Previous Page](#)

### Average Ratings page

This chart lists the average ratings, by role, from all participants that rated a section, item, or subitem. Summary ratings are rolled up from lower-level ratings. The number in parentheses next to the role lists how many participants in that role are included in the average.

This page is available only from the Manager evaluation, and only if the role has the View Average Ratings check box selected on the Template Definition - Process page.

**Note.** A summary report containing all the Average Ratings page for an evaluation is available. To view it, click the View Graphical Ratings Report link at the end of the evaluation.

---

## Working with Writing Tools

This section discusses how to:

- Incorporate suggestions into comments using writing tools.
- Search for statements from the results writer.
- Search for development tips.

- Search for performance notes.
- Search for comments by other evaluators.
- View a list of other reviewers.
- View comments and ratings from other reviewers.
- Check language for appropriateness.

---

**Note.** All roles can access the writing tools, The navigation paths given here apply to the manager self-service pages because the manager's evaluation is the most common use of these tools. However, these tools are also available from other roles' evaluations if they are enabled for the role on the document template.

---

**See Also**

[Chapter 4, "Setting Up Text for Advisor Tools," page 71](#)

## Pages Used to Work with Writing Tools

Page Name	Definition Name	Navigation	Usage
Writing Tools – Suggested Results	EP_SUGGEST_RESULTS	<ul style="list-style-type: none"> <li>• Manager Self Service, Performance Management, Performance Documents, Current Documents, Current Performance Documents, Manager Evaluation</li> </ul> <p>Click a document link.</p> <p>Click the Start link or the Edit link on the Manager Evaluation step.</p> <p>Click the Writing Tools link in any section or subsection where it appears.</p> <ul style="list-style-type: none"> <li>• Manager Self Service, Performance Management, Development Documents, Current Documents, Current Development Documents, Manager Evaluation</li> </ul> <p>Click a document link.</p> <p>Click the Start link or the Edit link on the Manager Evaluation step.</p> <p>Click the Writing Tools link in any section or subsection where it appears.</p>	Incorporate text suggestions into comments.
Writing Tools - Results Writer Statements	EP_ADV_RESULT_WRT	Select <i>Results Writer</i> from the available options in the Find Additional Content field on the Writing Tools - Suggested Results page; then click Go.	Search for competency and sub-competency performance descriptions for a section or item.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Writing Tools - Development Tips	EP_DEV_TIPS	Select <i>Development Tips</i> from the available options in the Find Additional Content field on the Writing Tools – Suggested Results page; then click Go.	Search for development tips for a section or item.
Writing Tools - Performance Notes	EP_PERF_NOTEPAD	Select <i>Performance Notes</i> from the available options in the Find Additional Content field on the Writing Tools – Suggested Results page; then click Go.	Search for performance notes that you previously entered.
Writing Tools - Evaluators' Comments	EP_OTHER_COMMENTS	Select <i>Other Evaluators' Comments</i> from the available options in the Find Additional Content field on the Writing Tools – Suggested Results page; then click Go.	Search for other evaluators' comments that were entered for the employee.
Select Other Authors	EP_APPR_SEC_ROLES1	Click the View Other Authors link for a section on the Manager Evaluation page.	View a list of others who have evaluated the section or item. You can select an author to view the particular comments that they entered.
Other Author Section Detail	EP_APPR_SEC_ROLES2	Click the name of an author on the Select Other Authors page.	View comments that other reviewers have entered regarding the section or item.
Check Language	EP_LANG_CHECK_SEC	Click the Check Language button at the bottom of the manager's performance document.	Check for inappropriate language within a review and review suggested alternatives.  <b>Note.</b> If the Language Checker feature is enabled on the document template, the Check Language button appears at the bottom of the manager's document.

## Incorporating Suggestions into Comments Using Writing Tools

Access the Writing Tools – Suggested Results page (Manager Self Service, Performance Management, Performance Documents, Current Documents, Current Performance Documents, Manager Evaluation. Click a document link. Click the Start link or the Edit link on the Manager Evaluation step. Click the Writing Tools link in any section or subsection where it appears).

**Performance Document - Annual Review**

**Writing Tools - Suggested Results**

Connie Chung, Auditor-General  
Annual Review: 01/01/2002 - 12/31/2002

Suggested Results <span>Customize   View All   First 1-4 of 4 Last</span>	
Suggested Results Text	Source
<input type="checkbox"/> Connie keeps her functional skills and knowledge up to date. She knows the latest techniques and understands the current trends. She reads trade magazines, attends training and keeps in touch with experts.	Results Writer
<input type="checkbox"/> Connie is very knowledgeable in her functional area. She understands the purpose and function of each process within her area and how her function affects the organization.	Results Writer
<input type="checkbox"/> Connie's level of functional knowledge is quite satisfactory. She has a very clear understanding of the practices and techniques of her field.	Results Writer
<input type="checkbox"/> Connie has a solid grasp of the technical skills needed to do her job. She uses these skills to perform her technical work well.	Results Writer

[Select All](#) [Deselect All](#)

Comments:

Connie has a solid grasp of the technical skills needed to do her job. She uses these skills to perform her technical work well.

Find Additional Content:

Writing Tools: Suggested Results page

**Suggested Results**

This grid can contain any or all of these items:

- Results Writer text.
- Development tips.
- Notes.
- Comments from other evaluators.

You can select one or more comments and click the Add to Comments button to add them to the comments for this section. Comments are added without line breaks — you must manually insert line breaks to start each comment on a new line.

**Add to Comments** Click this button to incorporate suggested text into the Comments field.

**Comments** Use this field to incorporate text from any of the writing tools that are available to you. You can modify the text after you incorporate it.

**Find Additional Content and Go** Select the writing tool you want to use to find additional suggestions for the comment. This field enables you to find other text items to incorporate into the comments box, in the case that you don't find suitable text in the Suggested Results list. Only tools that are enabled for the role on the document template appear. Click Go after you select an option.

### **See Also**

[Chapter 4, "Setting Up Text for Advisor Tools," Template Setup for Using Results Writer and Development Tips, page 72](#)

## **Searching for Statements from the Results Writer**

Access the Writing Tools - Results Writer Statements (select Results Writer from the available options in the Find Additional Content field on the Writing Tools – Suggested Results page).

**Performance Document - Annual Review**

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**Writing Tools - Results Writer Statements**

Christelle Stevenson, Clerk-Payroll Sr  
Annual Review: 01/01/2002 - 12/31/2002

**Writing Tools - Results Writer Statements**

Search for text:

Competency:  

Sub-Competency:  

Review Rating:  

**Comments:**




---

Find Additional Content: 


Writing Tools - Results Writer Statements page

- Search for text** Enter a keyword to limit the suggestions returned. You can search for text independently without entering competency, sub-competency, or rating.
- Competency** Select the competency for which to search. If you search by competency, you can further refine the search by entering a sub-competency or a review rating.
- Sub-Competency** Select the sub-competency for which to search. This field appears only if you select a competency that has sub-competencies and if the document template is set up to search sub-competency data for the section.
- Review Rating** Select the review rating for which to return text suggestions that are linked to competencies or sub-competencies. You must enter a competency or sub-competency before you can enter a rating.

## Searching for Development Tips

Access the Writing Tools - Development Tips page (select Development Tips from the available options in the Find Additional Content field on the Writing Tools – Suggested Results page).

**Performance Document - Annual Review**

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**Writing Tools - Development Tips**

Connie Chung, Auditor-General  
Annual Review: 01/01/2002 - 12/31/2002

**Writing Tools - Development Tips**

Search for text:

Competency:  

Sub-Competency:  

Review Rating:  

**Comments:**




**Find Additional Content:**  

### Writing Tools – Development Tips page

- Search for text** Enter a keyword to limit the suggestions returned. You can search for text independently without entering competency, sub-competency, or rating.
- Competency** Select the competency for which to search. If you search by competency, you can further refine the search by entering a sub-competency or a review rating.
- Sub-Competency** Select the sub-competency for which to search. This field appears only if you select a competency that has sub-competencies and if the document template is set up to search sub-competency data for the section.
- Review Rating** Select the review rating for which to return text suggestions that are linked to competencies or sub-competencies. You must enter a competency or sub-competency before you can enter a rating.

## Searching for Performance Notes

Access the Writing Tools – Performance Notes page (select Performance Notes from the available options in the Find Additional Content field on the Writing Tools – Suggested Results page; then click Go).

**Performance Document - Performance Document**

---

**Writing Tools - Performance Notes**

Christelle Stevenson, Clerk-Payroll Sr  
 Performance Document: 01/01/2004 - 12/31/2004

**Date Range**

Begin Date:   End Date:

**Suggested Results** [Customize](#) | [View All](#)

First  **1-2 of 2**  Last

**Suggested Results Text**

Average wait time = 1 hour 13 minutes.  
 Christelle's wait time is just slightly over her goal however she is improving nicely.

Average wait time = 1 hour 45 minutes.  
 Christelle's wait time is a little high this quarter, however she is still learning the new product line she just began supporting and isn't quite up to speed.

[Select All](#) [Deselect All](#)

**Comments:**

Christelle received special recognition for her contribution in managing the budget process for the year. The reports and forecasts she provided were an integral part in the company successfully meeting the budgeted numbers. Average wait time = 54 minutes

Christelle's has achieved her goal and actually has the lowest wait time of all analyst.  
 Christelle focuses on her customer service and has achieved her reduction in customer

Find Additional Content:

Writing Tools – Performance Notes page

Use this page to search performance notes that you recorded. You can only search for those notes that you entered. Employees cannot retrieve notes that their manager entered about them; and managers cannot retrieve notes that their employees entered.

Performance notes that are recorded as part of the Establish Criteria step are stored with the particular section and item to which they pertain, and appear on the Suggested Results page.

**Date Range and Search** Enter a date range to limit the search for performance notes. Click Search. All notes that you entered within the date range appear in the Results grid.

**Add to Comments**      Select the note that you want to add to the Comments section and then click this button. The system adds the note to the Comments field. You can edit the text that appears in the Comments field.

**Save and Return**      Click this button to save your comments and return to the Evaluation page.

### **See Also**

[Chapter 9, "Entering Comments and Ratings on Evaluations," Accessing Notes, page 164](#)

## **Searching for Comments by Other Evaluators**

Access the Writing Tools – Evaluators' Comments page (select Other Evaluators' Comments from the available options in the Find Additional Content field on the Writing Tools – Suggested Results page; then click Go).

**Performance Document - Performance Document**

**Writing Tools - Evaluators' Comments**

Christelle Stevenson, Clerk-Payroll Sr  
 Performance Document: 01/01/2004 - 12/31/2004

**Writing Tools - Evaluators' Comments**

Role:

Name:

Document Section:

**Suggested Results** Customize | View All | First 1-3 of 3 Last

Suggested Results Text	Name
<input type="checkbox"/> Christelle has always been very helpful, when I've called her with support questions. She needs to get more familiar with her products however so it doesn't take her so long to answer simple questions.	Patrick Seto
<input type="checkbox"/> Christelle works hard to please her customers. She tries her best to answer questions quickly, however she needs to understand the products a little better. I took her a little long to answer my last question.	Patrick Seto
<input type="checkbox"/> I've never had any real complaints about Christelle's support. She is always friendly and helpful.	Patrick Seto

[Select All](#) [Deselect All](#)

**Comments:**

Christelle is a good customer support specialist. She is friendly and always tries to answer questions quickly.

Find Additional Content:

Writing Tools – Evaluators' Comments page

Use this page to search for comments that were entered by evaluators who are not the manager or employee.

**Role** Select the evaluator role. Only roles that are defined on the document template appear.

**Name** Select the person whose comments you want to view. You must first select the role before you can select a name.

<b>Document Section</b>	Select a document section to view comments that were made for that section by any evaluator in any role.
<b>Search</b>	Click to display results based on the criteria you entered.
<b>Suggested Results</b>	<p>This grid can contain any or all of these items:</p> <ul style="list-style-type: none"><li>• Results Writer text.</li><li>• Development tips.</li><li>• Notes.</li><li>• Comments from other evaluators.</li></ul> <p>You can select one or more comments and click the Add to Comments button to add them to the comments for this section. Comments are added without line breaks; you must manually insert line breaks to start each comment on a new line.</p>
<b>Add to Comments</b>	Click this button to incorporate suggested text into the Comments field.
<b>Comments</b>	Use this field to incorporate text from any of the writing tools that are available to you. You can modify the text after you incorporate it.
<b>Find Additional Content and Go</b>	Select the writing tool you want to use to find additional suggestions for the comment. This field enables you to find other text items to incorporate into the comments box, in the case that you don't find suitable text in the Suggested Results list. Only tools that are enabled for the role on the document template appear. Click Go after you select an option.

## Viewing a List of Other Reviewers

Access the Select Other Authors page (click the View Other Authors link for a section on the Manager Evaluation page).

**Mentor Evaluation**

---

**Select Other Authors**

Select the desired author to view the Competencies Section from their evaluation.

Competencies	
Author	Role
<a href="#">Patrick Seto</a>	Customer
<a href="#">Carmichael Espinosa</a>	Customer
<a href="#">Christelle Stevenson</a>	Employee
<a href="#">Antonio Santos</a>	Peer
<a href="#">Adland Chu</a>	Peer
<a href="#">Susan Hoinck</a>	Peer

[Return to Document Details](#)

Select Other Authors page

Use this page to view a list of other reviewers who have entered comments on the section or items within the section. You can select a reviewer and drill down to view the specific evaluation comments. You access this page through the View Other Authors link at the section level. It is available if the View Other check box is selected for the role on the Template Definition - Structure page, Section Roles grid, Section tab.

## Viewing Comments and Ratings From Other Reviewers

Access the Other Author Section Detail page (click the name of an author on the Select Other Authors page).

**Mentor Evaluation**

---

**Other Author Section Detail**

Author: Christelle Stevenson      Role: Employee  
Status: Completed      Due Date: 01/15/2005

Approval: Not Required

Below  
is  
the  
Competencies  
Section  
from  
the  
Employee  
-  
Christelle  
Stevenson's  
evaluation.

---

       [Return to Select Other Authors](#)

Other Author Section Detail page (1 of 2)

**Section Header**

[Expand Items](#)      [Collapse Items](#)

▾ Competency 1: Directiveness/Assertiveness

**Description**  
 - Sets limits, says no when necessary  
 - Confronts problem behavior.  
**Rating:**              3-Good                                      3.00

▶ Competency 2: Team leadership

▶ Competency 3: Action Oriented

▶ Competency 4: Functional / Technical Skills

**Competencies Summary**

**Rating:**              Talented                                      4.00  
**Comments:**        I'm a good team leader and I feel my skills have definitely been improving. I don't hesitate to take action on new fronts and I'm always willing to put in more energy than expected into whatever I take on. I'm also very committed to initiating new ideas and I consistently looks for the opportunity to act.

Previous Author

Next Author

[Return to Select Other Authors](#)

Other Author Section Detail page (2 of 2)

Use this page to view comments and ratings that other reviewers have entered regarding the section or item. Use the Previous Author and Next Author buttons to scroll through all the comments that reviewers have entered regarding the particular section or item.

## Checking Language for Appropriateness

Access the Check Language page (click the Check Language button at the bottom of the manager's performance document).

## Manager Evaluation

### Check Language

Word/Phrase found:      Age

Found in...

Description:    **Manager Comments Section**

Results:        **Performs better than others in her age group.**

**Language Suggestions:**    It is best not to refer to an employees age or maturity when describing the employees ability or inability to perform job tasks or functions.

**Proper Usage:**                    Employee lacks the proper managerial training to manage other employees.

**Incorrect Usage:**                Employee is too young to be managing other employees.

#### Check Language page

The word or phrase that's deemed inappropriate appears at the top of the page. The sentence in which it is used is shown below it.

- |                   |   |
|-------------------|---|
| <b>Change</b>     | Click this button to edit the sentence.   |
| <b>Ignore</b>     | Click this button to view the next sentence.  |
| <b>Ignore All</b> | Click this button to ignore all inappropriate words or phrases and return to the Manager Evaluation page. |
| <b>Close</b>      | Click this button to return to the Manager Evaluation page.   |

---

**Note.** If you find more than one objectionable word or phrase in the document, each appears in succession. You can edit the sentence where the text is found.

---

#### **Found in...**

This group box displays the name of the section and the comment that contains the inappropriate word or phrase.

- |              |  |
|--------------|--|
| <b>Apply</b> | This button is enabled after you click Change. Click this button to apply any changes you may have made and continue checking. |
|--------------|--|

**Cancel**

This button is enabled after you click Change. Click this button to cancel any changes you may have made and continue checking.

**See Also**

[Chapter 4, "Setting Up Text for Advisor Tools," page 71](#)

## Chapter 11

# Managing Reviews and Approvals

This chapter provides an overview of review and approval processes and discusses how to:

- Conduct reviews.
- Approve documents.
- Update person profiles.

---

## Understanding Review and Approval Processes

This section lists a prerequisite and discusses:

- Review and approval process options.
- Document statuses during review and approval.
- Review processes.

### Prerequisite

You must enable the review and approval notifications on the General Settings page for ePerformance for this process to work correctly.

---

**Note.** The Alternate Role User feature is not available in ePerformance.

---

### Review and Approval Process Options

This section discusses:

- Approval processing.
- Approval process participants.

#### ***Approval Processing***

When you set up the document template, you select a review and approval process option and designate the roles that need to approve the document. The approval process controls when documents require approval and whether or not an employee review is required.

Review and approval processes are designed to:

- Notify employees and managers of status changes when a review is required.
- Automatically route documents from one designated approver to another in the approval chain, and notify each approver by email when it is his or her turn to approve a document.
- Manage workflow; that is, the order in which the review and approval steps are performed.

The review and approval process options are:

- *Approval Before EE Review Held*

The document is approved before the manager discusses it with the employee.

- *Approval After EE Review Held*

The approval process is initiated after the manager has reviewed the document with the employee and the employee or the manager acknowledges the document.

- *Approval, No EE Review Held*

The manager does not need to review the document with the employee, but approval is required.

- *No Approval, EE Review Held*

The manager must review the document with the employee, but the document does not need approval.

- *No Approval, No EE Review Held*

The manager does not review the document with the employee, and the document does not need approval.

---

**Note.** The approval process within ePerformance does not support group ID. Group ID cannot be used as an approval method because the system does not store group ID on the document. Therefore, the system does not have a way to determine which group ID to use when a user is approving a document.

---

### ***Approval Process Participants***

The persons that must approve a document are determined by the approval rule set option that you select when creating the document template definition. You can have documents approved by:

- The manager's manager and the ePerformance human resources (HR) administrator.
- The ePerformance HR administrator only.

### **See Also**

[Chapter 2, "Setting Up ePerformance," page 7](#)

[Chapter 3, "Setting Up Document Templates," Defining Document Processes, page 52](#)

## Document Statuses during Review and Approval

Employee reviews and management approvals are not required in all cases. If they are required, the manager's evaluation is the one that is reviewed and approved, and the status of this document reflects the review and approval status.

The manager's evaluation is the final document in the performance process and becomes the document used to communicate the employee's performance. A manager can consolidate other evaluator comments and ratings into the final document by using writing tools and average ratings. In addition, the manager document is the one that other applications such as Salary Planning and Competency Management use for official purposes. Therefore, it is the document that goes through the approval process.

Status codes provide a way of identifying the stages that an document moves through during the review and approval process cycle. Status codes also control when users can view or edit document data, what actions they can perform, and what page controls are available to them.

The statuses through which consolidated documents must pass and the sequence of these statuses are determined by the approval process option that is defined on the template.

These statuses are:

- *In Progress*

This is the status of an evaluation when it is first created. While the status is *In Progress*, the employee and manager can modify all sections of their respective evaluations that the template definition permits. The evaluations stay in this status until the manager finishes the document and clicks one of the *Available for Review*, *Complete*, or *Submit for Approval* buttons. The exact buttons that appear depend on the setup and approval process that is required.

- *Available for Review*

A manager can mark an evaluation as *Available for Review* only when the current status of the evaluation is *In Progress* and one of the following two conditions are met:

- The review process is either *Approval Required After Review Held* or *No Approval - Review Held*.
- The review process is *Approval Required Before Review Held* and the approval status is set to *Approved*.

To change the status of an evaluation to *Available for Review*, the manager must click the *Available for Review* button. This enables the employee to view the consolidated document and add comments to the Employee Comments section. While the document is in *Available for Review* status, the manager can only edit the Manager Comments section.

While the consolidated document is available for review, the *Review Held* button appears on the document. This button enables the manager to change the status of the document to *Review Held* and indicates that the manager has met with the employee to review the consolidated document.

- *Review Held*

This status indicates that the manager has discussed the consolidated document with the employee. While a document has the status of *Review Held*, the employee and the manager have read-only access to the document, except to enter or edit the Manager Comments or Employee Comments sections of a document, if these sections exist.

- *Acknowledged*

This status indicates that the employee or the manager has acknowledged the document. When this status is in effect, the Employee Comments and Manager Comments sections both managers and employees have read-only access to the document. When a document is in this status, only the HR administrator can change the status back to *In Progress*.

- *Complete*

This status indicates that the evaluation process is finished. No further changes to the document are permitted. With this status, employees and managers have read-only access to the document and are unable to edit or modify the content. The manager, however, can click the Rework button on an employee or other participant evaluation to return the document to the employee for revision. When the manager returns a document, the system changes the document back to *In Progress* and makes the Complete button available again.

The employee clicks the Complete button to change the status of the document back from *In Progress* to *Complete*. This button becomes available when the document is first created or sent back for revision.

---

**Note.** Only the manager has the ability to send the document back for revision when the status of the consolidated document is *In Progress*.

---

- *Cancelled*

This status indicates that the document and all its associated evaluations is cancelled. Managers can cancel documents on the Manager Evaluation page until the time that the document status is *Acknowledged* or *Complete*. HR administrators can cancel documents at any time using their own Cancel Document page.

---

**Note.** The *Available for Review*, *Review Held*, and *Acknowledged* statuses never apply when the approval process option is set to *No Approval - No Review Held* or *Approval No Review Held*. In these cases, employees can only view the manager's document when the status is *Complete*.

---

## Review Processes

This section discusses:

- Process overview.
- Approval before review held.
- Approval after review held.
- Approval no review held.
- No approval no review held.
- No approval review held.

### **Process Overview**

Review process options, document statuses, and approval status values control:

- The page elements that are available.

- The different levels of access that managers, employees, and HR administrators have to the document.
- The actions that managers, employees, and HR administrators can perform at different points in the review and approval cycle.

---

**Note.** Other evaluation participants are not affected by review and approval processes.

---

The tables in this section illustrate how document status and approval status work together to control user actions on the manager document for each approval process option. The buttons that are listed in these tables are hidden until they are valid for use.

### ***Approval Before Review Held***

This table describes the *Approval Before Review Held* process actions and statuses.

<b><i>Action</i></b>	<b><i>Document Status</i></b>	<b><i>Approval Status</i></b>
1. Manager completes edits to the document.	In Progress	<i>Not Submitted</i>
2. Manager submits the document for approval.	In Progress	<i>Submitted</i>
3. All persons in the approval chain approve the document.	In Progress	<i>Approved</i>
4. Manager marks the document as available for review.	Available for Review	<i>Approved</i>
5. Manager discusses document with employee and marks the document as review held.	Review Held	<i>Approved</i>
6. Employee or manager acknowledges that the review occurred.	Acknowledged	<i>Approved</i>
7. Manager marks the review as completed.	Complete	<i>Approved</i>

---

**Note.** If approval is denied in step three, the document status remains *In Progress* and the approval status changes to *Denied*.

---

### ***Approval After Review Held***

This table describes the *Approval After Review Held* process actions and statuses.

<b>Action</b>	<b>Document Status</b>	<b>Approval Status</b>
1. Manager completes edits to the document.	In Progress	Not Submitted
2. Manager clicks the Available for Review button.	Available for Review	Not Submitted
3. Manager discusses document with employee and clicks the Review Held button.	Review Held	Not Submitted
4. Employee or manager clicks the Acknowledge button to acknowledge the document.	Acknowledged	Not Submitted
5. Manager clicks the Submit for Approval button	Acknowledged	Submitted
6. All persons in the approval chain approve the document.	Acknowledged	Approved
7. Manager clicks the Complete button to complete the document.	Complete	Approved

---

**Note.** If approval is denied in step six, the document status changes to *In Progress* and the approval status changes to *Denied*.

---

### **Approval No Review Held**

This table describes the *Approval No Review Held* process actions and statuses.

<b>Action</b>	<b>Document Status</b>	<b>Approval Status</b>
1. Manager completes edits to the document.	In Progress	Open
2. Manager clicks the Submit for Approval button to initiate the approval process.	In Progress	Submitted
3. All persons in the approval chain approve the document.	In Progress	Approved
4. Manager clicks the Complete button to complete the document.	Complete	Approved

---

**Note.** If approval is denied in step three, the document status changes to *In Progress* and the approval status changes to *Denied*.

---

### ***No Approval No Review Held***

This table describes the *No Approval No Review Held* process actions and statuses.

<b><i>Action</i></b>	<b><i>Document Status</i></b>	<b><i>Approval Status</i></b>
1. Manager completes edits to the document.	In Progress	Approval Not Required
2. Manager clicks the Complete button to complete the document.	Complete	Approval Not Required

### ***No Approval Review Held***

This table describes the *No Approval Review Held* process actions and statuses.

<b><i>Action</i></b>	<b><i>Document Status</i></b>	<b><i>Approval Status</i></b>
1. Manager completes edits to the document.	In Progress	Approval Not Required
2. Manager clicks the Available for Review button.	Available for Review	Approval Not Required
3. Manager discusses review with employee and clicks the Review Held button.	Review Held	Approval Not Required
4. Employee or manager clicks the Acknowledge button to acknowledge the document.	Acknowledged	Approval Not Required
5. Manager clicks the Complete button to complete the document.	Complete	Approval Not Required

---

## **Conducting Reviews**

This section lists the pages used to conduct reviews.

**See Also**

Chapter 9, "Entering Comments and Ratings on Evaluations," page 159

Chapter 10, "Consolidating Feedback from Evaluators," page 183

**Pages Used to Conduct Reviews**

Page Name	Definition Name	Navigation	Usage
Available for Review	EP_APPR_MAIN2	<ul style="list-style-type: none"> <li data-bbox="868 569 1161 741">• Manager Self Service, Performance Management, Performance Documents, Current Documents</li>   <li data-bbox="911 772 1161 856">Click a document link to open the Document Details page.</li>   <li data-bbox="911 888 1161 1060">Click the Available for Review link on the Manager Evaluation step to open the Manager Evaluation page.</li>   <li data-bbox="911 1092 1161 1218">Click the Available for Review button on the Manager Evaluation page.</li>   <li data-bbox="868 1249 1161 1421">• Manager Self Service, Performance Management, Development Documents, Current Documents</li>   <li data-bbox="911 1453 1161 1537">Click a document link to open the Document Details page.</li>   <li data-bbox="911 1568 1161 1740">Click the Available for Review link on the Manager Evaluation step to open the Manager Evaluation page.</li>   <li data-bbox="911 1772 1161 1898">Click the Available for Review button on the Manager Evaluation page.</li> </ul>	Confirm that you want to change the document status to <i>Available for Review</i> .

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Reopen Evaluation	EP_APPR_MAIN2	<ul style="list-style-type: none"> <li>• Manager Self Service, Performance Management, Performance Documents, Current Documents</li> </ul> <p>Click a document link to open the Document Details page.</p> <p>Click the Reopen link on the Manager Evaluation step to open the Manager Evaluation page.</p> <p>Click the Reopen button on the Manager Evaluation page.</p> <ul style="list-style-type: none"> <li>• Manager Self Service, Performance Management, Development Documents, Current Documents</li> </ul> <p>Click a document link to open the Document Details page.</p> <p>Click the Reopen link on the Manager Evaluation step to open the Manager Evaluation page.</p> <p>Click the Reopen button on the Manager Evaluation page.</p>	Confirm that you want to reopen a document that you previously marked as <i>Available for Review</i> .

---

## Approving Documents

This section discusses how to:

- Select documents to approve.
- Approve documents.
- Resolve approval transactions in error.
- Delegate approvals.

**See Also**

Chapter 13, "Using Inquiry Pages," Viewing Approval Status, page 275

**Pages Used to Approve Documents**

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Select Transaction to Approve	SS_LIST	Manager Self-Service, Performance Management, Approve Documents, Select Transaction to Approve	Select the employees for whom you want to grant or deny approval of a document.
View Approval Status Summary	SS_LIST	Manager Self-Service, Performance Management, View Approval Status, View Approval Status Summary	View a list of employees and their approval status.
Approve Transaction View Approval Status Detail  Approval Request - Confirmation Approval Request - Confirmation	EP_APPRAISAL_MGR	Select a document on the Select Transaction to Approve page.	Approve or deny approval of a document.
Approve Performance Documents Administer Request - Confirmation	EP_APPRAISAL_ADM	Workforce Development, Performance Management, Administer Documents, Approve Documents, Approve Performance Documents  Click the link for a listed document.	Approve or deny approval of a document.
Process Comments	SS_PROC_CMNTS_SEC	Click the Comments link on the Approve Performance Documents page.	View comments that other approvers enter.
Save Confirmation	EO_SAVE_CONFIRM	Click Save after approving or denying approval for a document on the Approve Performance Documents page.	Confirm that you intended to approve or deny approval of the document and save the action.

## Selecting Documents to Approve

Access the Select Transaction to Approve page (Manager Self-Service, Performance Management, Approve Documents, Select Transaction to Approve).

### Select Transaction to Approve

The hyperlinks below indicate employees which require your participation in an approval process. Select on a hyperlink to see details about what needs to be approved for each employee

Performance Document						
Name	Begin Date	End Date	Document Status	Approval Status	Submitted By	Document Type
<a href="#">Antonio Santos</a>	01/01/2009	12/31/2009	In Progress	Submitted	Tina Palisco	Annual Review
<a href="#">Rochelle Li</a>	01/01/2009	12/31/2009	In Progress	Submitted	Tina Palisco	Annual Review

Select Transaction to Approve page

This page enables you to view the documents that you need to approve. It is identical to the View Approval Status Summary page except the Select Transaction to Approve page lists only documents that you have not yet approved, while the View Approval Status Summary page lists all documents where you are an approver or an originator.

## Approving Documents

Access the Approve Transaction or the Approve Performance Documents page (select a document on the Select Transaction to Approve page).

---

**Note.** These two pages are identical in use, except that the Approve Transaction page is used by managers and the Approve Performance Documents page is used by HR Administrators.

---

## Approve Transaction

Approve or deny the proposed information for the employee listed below. You may also enter optional comments about each approval choice. When you are finished, select the Approve or Deny button at the bottom of the page.

Antonio Santos
EmplID: KU0010

Performance Document

Doc Type: Annual Review

Author:

Period Begin Date: 01/01/2009      Period End Date: 12/31/2009

Rating: Meets Expectations

[Performance Document Details](#)

Process Detail

Name	Role Name	Process Action	Process Action Date
Tina Palisco	Originator	Submit	03/09/2009

### Evaluation Approval Chain

:Pending

Evaluation Approval Chain

Pending

🕒
Multiple Approvers  
ePerformance HR Administrator

Comment:

Approve
Deny

Approve Transaction page

**Performance Document Details** Click this link to display the Manager Evaluation page in display-only mode. This page contains the consolidated evaluations and comments from all participants.

**Process Detail** This group box displays detailed information about the approval process.

<b>Evaluation Approval Chain</b>	This group box displays the approvers in the approval process and their status. Click the name link to open a new browser window containing detailed information about the approver.
<b>Comment</b>	Use this text box to explain the reason for approving the document, or denying approval.
<b>Approve</b>	Click this button to approve the transaction.
<b>Deny</b>	Click this button to deny the transaction.

## Resolving Approval Transactions in Error

If an error occurs and the system is not able to route the transaction to its intended approver, the system automatically routes the transaction to the administrator, as defined on the approval process definition. The administrator can then review the transaction using the Monitor Approvals (PTAF\_ADMIN\_MON) component to approve, deny, or reassign the transaction to the appropriate approver

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Approvals," Administering Approvals.

## Delegating Approvals

Approvers can delegate the approval of a performance or development document to another peer or subordinate.

To delegate the approval transaction:

1. An administrator must activate the EP\_APPRAISAL transaction on the Configure Delegation Transaction page.
2. The manager must assign a proxy using the Manage Delegation page.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Delegation," Working with Self-Service Delegation.

---

## Updating Person Profiles

This section provides an overview on the update person profile process.

## Understanding the Update Person Profile Process

When the document is complete, the employee's person profile can be updated with the information from the performance or development document. To update the employee's person profile:

1. The system checks that the Update Person Profile check box is selected on the Template Definition - Structure page - Profile Management tab for the role.

2. If the Update Person Profile check box is selected, then the system identifies the profiles types that need to be updated for the employee. If a profile does not exist, the system create one for the employee.
3. The system copies all items for each section into the employee's profile.

## Chapter 12

# Performing Administrative Tasks

This chapter discusses how to:

- Manage administrative tasks.
- Manage document processes.
- Create business objectives pages.
- Manage business objectives.
- Publish business objectives.
- Cascade objective items.
- Administer business objectives
- Create objectives summary data.
- Identify business objective nodes.
- Restart objective batch processes.
- Generate reports.

---

## Managing Administrative Tasks

This section provides an overview of administrative tasks and discusses how to:

- Transfer documents.
- Confirm transfers.
- Select documents for status change.
- Cancel documents.
- Delete documents.
- Select documents to enter preliminary ratings.
- Enter preliminary ratings.

## Understanding Administrative Tasks

This section discusses these topics:

- Transfer
- Status change
- Cancel
- Delete
- Preliminary ratings

---

**Note.** You can perform certain administrative tasks outside of the evaluation cycle. Typically, administrators perform these tasks for documents that belong to one or more groups of employees that do not report to them, while managers work only with documents for employees or groups that report directly to them.

---

### ***Transfer***

You might transfer a document from one manager to another if an employee is reassigned or if a reorganization occurs. Administrators can transfer any document that is in any status. Managers can transfer only documents that they currently own with a status of *In Progress*, *Available for Review*, *Review Held*, or *Acknowledged*.

When a document is transferred, the system automatically notifies the new manager that he or she is responsible for completing the evaluation process that is in progress for that employee.

### ***Status Change***

The status of individual evaluations that are part of a document changes when employees and managers perform tasks such as opening or completing the evaluation, or managers mark an evaluation as *Available for Review*, *Review Held*, or *Acknowledged*. The manager can also change the status of an employee evaluation by clicking the Reopen button on the Employee Evaluation page. This changes the status of the employee evaluation back to *In Progress*. The Reopen button is available to the manager and ePerformance Administrator for evaluations when they are not the owner (the manager can't reopen their own evaluation) and the evaluation status is *Complete* or *Cancelled* and the overall document status is *In Progress*. Once the manager moves their document status past *In Progress*, they can not reopen the employee evaluation.

However, additional situations might occur where managers or ePerformance administrators need to change the statuses of documents as a whole. Document statuses are changed using pages that are found on the Administrative Tasks menu. Document statuses can only be changed to *In Progress*.

Managers can change documents to *In Progress* from any of these statuses:

- *Available for Review*
- *Review Held*
- *Acknowledged*
- *Cancel*
- *Delete*

ePerformance Administrators can change document statuses to *In Progress* from any of the above statuses plus:

- *Complete*
- *Cancelled*

If a document is changed from *Complete* or *Cancelled* to the *In Progress* status, the document is removed from all approval queues and becomes inaccessible to the employee. If the status is changed from *Complete* to *In Progress*, the following steps on the Document Details page also change to *In Progress*: Nominate Participants; Track Nominations; and Review Participant Evaluations.

Any competency ratings that were pushed from the completed evaluation to Job Profile Manager (JPM) are rolled back. Managers must then move the document back through the entire sequence of statuses until they can once again mark it as complete.

### **Cancel**

ePerformance enables managers and ePerformance administrators to cancel a document. Managers can only cancel documents with a status of *In Progress*. ePerformance administrators can cancel any document that is not already cancelled.

After you cancel a document, it becomes inactive. Canceling a document does not remove it from the system – it only marks it as cancelled and the document appears in the Historical Documents page instead of the Current Documents page.

When the system updates Manage Profiles, the system deletes all documents that have been cancelled and updates the Manage Profiles business process.

### **Delete**

Because cancelled documents are not physically deleted from the system, ePerformance provides a delete function that enables you to remove documents and all their associated evaluations completely from the system.

### **Preliminary Ratings**

Managers can enter preliminary ratings for employees and update these ratings at any time that a document's status is *In Progress*. Preliminary ratings use the rating model that is defined for the Overall Summary section and are used to generate the View Ratings Summary (EP\_DISTRIB\_SUM) report, which you use to analyze whether ratings are distributed in the expected manner. Employees cannot view preliminary ratings.

## Pages Used to Manage Administrative Tasks

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Transfer Document	EP_APPR_SELECT	<ul style="list-style-type: none"> <li>• Manager Self Service, Performance Management, Performance Documents, Administrative Tasks, Transfer Document, Transfer Document</li> <li>• Workforce Development, Performance Management, Performance Documents, Administrative Tasks, Transfer Document, Transfer Document</li> <li>• Manager Self Service, Performance Management, Development Documents, Administrative Tasks, Transfer Document, Transfer Document</li> <li>• Workforce Development, Performance Management, Development Documents, Administrative Tasks, Transfer Document, Transfer Document</li> </ul>	Select documents for transfer from one manager to another.
Confirm Transfer	EP_APPR_XFER	On the Transfer Document page select one or more documents and then click the Continue button.	Confirm the transfer of documents between managers.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Reopen Document	EP_APPR_SELECT	<ul style="list-style-type: none"> <li>• Manager Self Service, Performance Management, Performance Documents, Administrative Tasks, Reopen Document, Reopen Document</li> <li>• Workforce Development, Performance Management, Performance Documents, Administrative Tasks, Reopen Document, Reset Document</li> <li>• Manager Self Service, Performance Management, Development Documents, Administrative Tasks, Reopen Document, Reopen Document</li> <li>• Workforce Development, Performance Management, Development Documents, Administrative Tasks, Reopen Document, Reopen Document</li> </ul>	Select documents for status change.
Confirm Status Reset	EP_APPR_STATUS	On the Reopen Document page select one or more documents and then click the Continue button.	Confirm an document status change.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Cancel Document	EP_APPR_SELECT	<ul style="list-style-type: none"> <li>• Manager Self Service, Performance Management, Performance Documents, Administrative Tasks, Cancel Document, Cancel Document</li> <li>• Workforce Development, Performance Management, Performance Documents, Administrative Tasks, Cancel Document, Cancel Document</li> <li>• Manager Self Service, Performance Management, Development Documents, Administrative Tasks, Cancel Document, Cancel Document</li> <li>• Workforce Development, Performance Management, Development Documents, Administrative Tasks, Cancel Document, Cancel Document</li> </ul>	Cancel an document.
Confirm Cancellation	EP_APPR_CANCEL	On the Cancel Document page select one or more documents and click the Continue button.	Confirm a document cancellation.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Delete Documents	EP_APPR_SELECT	<ul style="list-style-type: none"> <li>• Manager Self Service, Performance Management, Performance Documents, Administrative Tasks, Delete Document, Delete Documents</li> <li>• Workforce Development, Performance Management, Performance Documents, Administrative Tasks, Delete Document, Delete Documents</li> <li>• Manager Self Service, Performance Management, Development Documents, Administrative Tasks, Delete Document, Delete Documents</li> <li>• Workforce Development, Performance Management, Development Documents, Administrative Tasks, Delete Document, Delete Documents</li> </ul>	Delete documents that you previously cancelled.
Confirm Delete	EP_APPR_DELETE	On the Delete Document page select one or more documents and then click the Continue button.	Confirm a document deletion.
Enter Preliminary Ratings	EP_APPR_SELECT	Manager Self Service, Performance Management, Performance Documents, Administrative Tasks, Enter Preliminary Ratings, Enter Preliminary Ratings	Select one or more employees for whom you want to enter preliminary ratings.
Preliminary Ratings	EP_APPR_PRELIM	On the Enter Preliminary Ratings page select one or more documents and then click the Continue button.	Enter preliminary ratings for selected employees.

Page Name	Definition Name	Navigation	Usage
Enter Preliminary Ratings - Save Confirmation	EO_SAVE_CONFIRM	On the Preliminary Ratings page click the Save button.	Confirm that you want to save the preliminary ratings that you entered.
View Performance Documents	EP_APPR_SELECT	Workforce Development, Performance Management, Performance Documents, View Documents, View Performance Documents	View documents.

## Transferring Documents

Access the Transfer Document page (Manager Self Service, Performance Management, Performance Documents, Administrative Tasks, Transfer Document, Transfer Document).

### Transfer Document

To transfer a performance document, select the checkbox for the Employee and then select the Continue push button.

**Search for Documents**

Employee First Name:	<input type="text" value="Rochell"/>	Last Name:	<input type="text"/>
Manager First Name:	<input type="text"/>	Last Name:	<input type="text"/>
Document Type:	<input type="text" value="Annual Review"/>	Status:	<input type="text" value="In Progress"/>
Period Between:	<input type="text" value="01/01/2006"/>		<input type="text" value="12/31/2006"/>

Performance Documents							Customize   Find         First 1 of 1 Last
	Employee	Document Type	Begin Date	End Date	Job Title	Status	Manager
<input type="checkbox"/>	Rochelle Li	Annual Review	01/01/2006	12/31/2006	Clerk-Data Entry	In Progress	Tina Palisco

[Select All](#) [Deselect All](#)

Transfer Document page

The ePerformance Administrator view, shown above, enables you to select and transfer documents regardless of the manager. Documents with a status of *Complete* or *Cancelled* are historical documents and cannot be transferred.

This functionality is sometimes used to finish evaluations when the manager is not allowed to do so (for example, in cases where there is a reassignment, LOA, or any situation where the manager can't complete the transfer). You can narrow the search by entering one or more of the search fields.

If you click Search without entering criteria, the system displays all employee evaluations in the organization.

The manager's view is limited to documents that the manager owns. The manager cannot search for other documents. After selecting one or more documents, click Continue. The system displays the Confirm Transfer page.

## Confirming Transfers

Access the Confirm Transfer page (on the Transfer Document page select one or more documents and then click the Continue button).

**Transfer Document**

---

**Confirm Transfer**

Performance Documents						
Employee	Document Type	Begin Date	End Date	Job Title	Status	Manager
Rochelle Li	Annual Review	01/01/2006	12/31/2006	Clerk-Data Entry	In Progress	Tina Palisco

You have chosen to transfer the document indicated above to another manager.  
 Select the receiving manager by using the "Select a Manager" hyperlink, then select the **Save** button to complete the transfer.

**New Manager ID:**

[Select a Manager](#)

[Return to Previous Page](#)

Confirm Transfer page

**Select a Manager**

Click this link to select the manager to receive the transfer then click Save.

## Selecting Documents for Status Change

Access the Reopen Document page (Manager Self Service, Performance Management, Performance Documents, Administrative Tasks, Reopen Document, Reopen Document).

### Reopen Document

To change a performance document's status back to "In Progress", select the checkbox next to the Employee's Name and then select the Continue push button.

**Search for Documents**

Employee First Name:  Last Name:

Manager First Name:  Last Name:

Document Type:  Status: Review Held

Period Between:

Performance Documents							
	Employee	Document Type	Begin Date	End Date	Job Title	Status	Manager
<input type="checkbox"/>	Bill Hyland	Test Annual	07/01/2001	12/31/2001	Accounting Clerk	Review Held	Stephanie Heller
<input type="checkbox"/>	Edward Calson	Test Annual	01/01/2002	12/31/2002	Accounting Clerk	Review Held	Stephanie Heller
<input type="checkbox"/>	Harold Davidson	Test Annual	01/01/2002	12/31/2002	Accounting Clerk	Review Held	Stephanie Heller
<input type="checkbox"/>	Mark Mayer	Test Annual	01/01/2002	12/31/2002	Accounting Clerk	Review Held	Stephanie Heller
<input type="checkbox"/>	Tina Palisco	Annual Review	01/01/2002	12/31/2002	Manager-Finance	Review Held	Marc Kessler

[Select All](#) [Deselect All](#)

### Reopen Document page

All documents in the *Available for Review*, *Review Held*, or *Acknowledged* status can appear in the list.

The ePerformance administrator view contains search fields to narrow the list by manager first or last name, employee first or last name, document type, status, or period between.

To change the document status, select one or more documents and then click the Continue button. A confirmation page appears on which you can either confirm the status change or return without changing status.

---

**Note.** The Reopen Document page only changes the status of the overall document and the manager evaluation. The manager or HR Administrator must reset the status of individual evaluations within each evaluation.

---

### See Also

[Chapter 12, "Performing Administrative Tasks," Managing Document Processes, page 232](#)

## Canceling Documents

Access the Cancel Document page (Manager Self Service, Performance Management, Performance Documents, Administrative Tasks, Cancel Document, Cancel Document).

### Cancel Document

To cancel a performance document, select the checkbox for the Employee and then select the Continue push button. All documents can be cancelled except for already "Cancelled" performance documents.

**Search for Documents**

Employee First Name:  Last Name:

Manager First Name:  Last Name:

Document Type:  Status:

Period Between:

Performance Documents							
Employee	Document Type	Begin Date	End Date	Job Title	Status	Manager	
<input type="checkbox"/>	Rochelle Li	Annual Review	01/01/2006	12/31/2006	Clerk-Data Entry	In Progress	Tina Palisco

[Select All](#) [Deselect All](#)

Cancel Document page

### Search for Documents

ePerformance administrators use this group box to search for non-cancelled documents, regardless of the manager. If you click Search without entering criteria, all employee evaluations in the organization appear.

Manager's use this group box to search for documents they own where the status is *In Progress*.

### Performance Documents

This group box displays the results of the search. The administrator or manager can select one or more documents. A confirmation page displays after the system notifies the user the cancellation was completed.

## Deleting Documents

Access the Delete Documents page (Manager Self Service, Performance Management, Performance Documents, Administrative Tasks, Delete Document, Delete Documents).

### Delete Documents

To delete a performance document, select the checkbox next to the Employee's Name and then select the Continue push button. Only "Cancelled" performance documents can be deleted.

**Search for Documents**

Employee First Name:  Last Name:

Manager First Name:  Last Name:

Document Type:  Status:

Period Between:

Performance Documents <span style="float: right;">Customize   Find   First 1-5 of 5 Last</span>							
	Employee	Document Type	Begin Date	End Date	Job Title	Status	Manager
<input type="checkbox"/>	Anne Ovark	Mgr clones Perf Doc	09/29/2002	10/29/2002	Accounting Clerk	Cancelled	Mary Samstone
<input type="checkbox"/>	Bailey MacDonald	Annual Review	01/01/2002	12/31/2002	Analyst-Financial Sr	Cancelled	Betty Locherty
<input type="checkbox"/>	Edward Eddington	Test Annual	07/01/2001	12/31/2001	Accounting Clerk	Cancelled	Stephanie Heller
<input type="checkbox"/>	Margaret Gasson	EE and Mgr clone Perf Doc	03/04/2001	04/04/2001	Accounting Clerk	Cancelled	Shannon Thompson
<input type="checkbox"/>	Steven Thompson	Test Annual	01/01/2002	12/31/2002	Accounting Clerk	Cancelled	Stephanie Heller

[Select All](#) [Deselect All](#)

#### Delete Documents page

The ePerformance administrator view enables you to delete any documents that are *Cancelled*. You can narrow the search by entering selection criteria in one or more of the search fields. If you click Search without entering any data, all employee evaluations with a *Cancelled* status appear.

The manager's view displays cancelled documents that the manager owns and does not enable the manager to enter search fields.

After selecting one or more documents, click Continue. The Confirm Delete page appears.

## Selecting Documents to Enter Preliminary Ratings

Access the Enter Preliminary Ratings page (Manager Self Service, Performance Management, Performance Documents, Administrative Tasks, Enter Preliminary Ratings, Enter Preliminary Ratings).

## Enter Preliminary Ratings

Listed below are the 'In Progress' performance documents for which you are the Manager. To enter a preliminary rating, select the documents using the checkbox and select the Continue push button.

Performance Documents						
Employee	Document Type	Begin Date	End Date	Job Title	Preliminary Rating	
<input type="checkbox"/> Adland Chu	Annual Review	01/01/2002	12/31/2002	Clerk-Payroll Sr		
<input type="checkbox"/> Angela McKay	Annual Review	01/01/2002	12/31/2002	Auditor-General		
<input type="checkbox"/> Christelle Stevenson	Annual Review	01/01/2002	12/31/2002	Clerk-Payroll Sr	Exceeds Expectations	
<input type="checkbox"/> Wendy Kwan	Annual Review	01/01/2002	12/31/2002	Analyst-Financial		

[Select All](#)
[Deselect All](#)

Enter Preliminary Ratings page

Select one or more employees and then click the Continue button.

See [Chapter 9, "Entering Comments and Ratings on Evaluations," Recording Preliminary Ratings, page 162.](#)

## Entering Preliminary Ratings

Access the Preliminary Ratings page (from the Enter Preliminary Ratings page, select one or more employees and then click the Continue button).

### Enter Preliminary Ratings

## Preliminary Ratings

You have chosen to enter or update the Preliminary Rating on the document indicated above. Enter the new Preliminary Rating in the box below, then select the Save button.

Performance Documents						
Employee	Document Type	Begin Date	End Date	Job Title	Preliminary Rating	
Christelle Stevenson	Annual Review	01/01/2002	12/31/2002	Clerk-Payroll Sr	Exceeds Expectations <input type="button" value="v"/>	

[Return to Previous Page](#)

Preliminary Ratings page

Select a preliminary rating from the Preliminary Rating drop-down list box; then click Save.

---

## Managing Document Processes

This section presents an overview of document process management and lists the pages used to manage document processes.

### Understanding Document Process Management

If you have the ePerformance administrator role, you can view any document in any status and perform certain tasks that change the document status or due date. This is a *safety valve* in case the employee or manager are unable to complete the tasks.

Follow these steps:

1. To open the Document Details page for the document, enter selection criteria on one of the view documents pages (Performance or Development) and select the document that you want to view from the results list.
2. Click the View link next to a step to see the details of that step.

You can view details of a step only after the step is started.

3. Perform various tasks on the Establish Criteria document (criteria document) or role evaluations.

The tasks that are available to you depend on the status of the criteria document or role evaluation. These are:

- Change the due date.
- Reopen criteria document or evaluation.
- Cancel criteria document or evaluation.

The procedures for selecting documents, viewing document details, and performing tasks as an administrator are the same as the procedures for any other role.

#### **See Also**

[Chapter 5, "Generating Documents," Accessing Documents, page 104](#)

[Chapter 7, "Modifying Evaluation Criteria," Modifying Evaluation Criteria, page 131](#)

## Pages Used to Manage Document Processes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
View Performance Documents View Development Documents	EP_APPR_SELECT	<ul style="list-style-type: none"> <li>Workforce Development, Performance Management, Performance Documents, View Documents, View Performance Documents</li> <li>Workforce Development, Performance Management, Development Documents, View Documents, Development Documents</li> </ul>	Search for and view a list of documents that meet the search criteria
View Performance Documents - Document Details View Development Documents - Document Details	EP_APPR_DETAIL	Click a document type link on the View Performance Documents page	View the details of the selected document.

---

## Creating Business Objectives Pages

This section provides an overview on the administration of business objectives pages, lists common elements used in this section, and discusses how to:

- Select an objective plan.
- Create business objectives.
- Confirm the creation of objective pages.

## Understanding the Creation of Business Objectives Pages

This section discusses these topics:

- Process overview.
- Administrator role.

- Manager role.

### **Process Overview**

You can share the administration or management of the objectives pages between the administrator and the objective page owner. The objective page owner is typically the executive or manager responsible for the objectives at a particular level of the organization.

Administrators, as well as the objectives page owners, have the ability to update objective pages once they are created. At the upper levels of the organization, the responsibility typically falls to the administrator or the executive administrative assistant; however, as the process moves down the organization, the individual owners are more likely to update the pages themselves.

The system allows both roles to update the objectives pages. For this reason, the page owner will have access to some of the administrative capabilities.

### **Administrator Role**

Once you setup the plan, complete the templates, and identify business objective nodes, the administrator creates and administers the pages that are built from the templates. These transactions include the ability to create, update, view, and publish the objective pages.

PeopleSoft has created a permission list to support the objective functionality. This permission list is called Manage Objective Pages and includes these transactions:

- Create Objective Pages.
- Administer Objective Pages (Update).
- Publish Objective Pages.

PeopleSoft has added this permission list to the ePerformance HR Admin role. This role is responsible for administering all the day to day ePerformance activities under Workforce Development, Performance Management. This role is used for allowing access to the new pages described within this section.

---

**Note.** Before you can create business objective pages, you must first identify the nodes using the Identify Business Objective Nodes page.

---

See [Chapter 12, "Performing Administrative Tasks," Identifying Business Objective Nodes, page 262.](#)

### **Manager Role**

Once the page has been created and the page owner has been identified, each page owner will need access to their objectives page to add and update their objectives. They will also be able to access other business objective pages once they have been created.

PeopleSoft modified the ePerformance Manager Permission List (HCCPSS2150) to support the objective functionality. This permission list includes the Update Objective Pages and View Objectives Pages transactions.

## Common Elements Used in this Section

**Objective Plan** Select the objective plan that you want to use to create, publish or update pages. After you select a plan, this field appears as display only on many pages. The system only displays plans that have a status of *Active*.

**Template** Select the template that you want to use to create objective pages. After you select a template, this field appears as display only on many pages. The system only displays templates that are effective as of the Objective Plan date.

## Pages Used to Create Business Objectives Pages

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Create Business Objectives - Select Objective Plan	EPO_PLAN_SELECT	Workforce Development, Performance Management, Business Objectives, Create Business Objectives, Create Business Objectives - Select Objective Plan	Click the link associated with the objective plan for which you want to create business objective pages.
Create Business Objectives	EPO_CREATE_PAGE	On the Create Business Objectives - Select Objective Plan page, click the link associated with the objective plan for which you want to create business objective pages.	Enter the criteria to be used to create the business objective pages.
Create Objective Pages - Confirmation	EPO_CREATE_RSLTS	On the Create Business Objectives page, click the Create Objective Pages button.	View the results of the create process to verify that your objective pages were created successfully.

## Selecting an Objective Plan

Access the Create Objective Pages page (Workforce Development, Performance Management, Business Objectives, Create Business Objectives, Create Business Objectives - Select Objective Plan).

**Create Business Objectives**  
**Select Objective Plan**

Choose an Objective Plan by selecting the appropriate hyperlink

Objective Plan		
Objective Plan	Objective Plan Begin date	Objective Plan End Date
<a href="#">Test 2007 Organizational objectives</a>	01/01/2007	12/31/2007
<a href="#">2008 Business Objectives</a>	01/01/2008	12/31/2008
<a href="#">2009 Business Objectives</a>	01/01/2009	12/31/2009
<a href="#">Test Plan - 2008</a>	01/01/2008	12/31/2008
<a href="#">Objective Volume testing - Position hierarchy</a>	01/01/2009	12/31/2009

Create Business Objectives - Select Objective Plan page

Click the link associated with the objective plan for which you want to create objective pages.

## Creating Business Objectives

Access the Create Business Objectives page (on the Create Business Objectives - Select Objective Plan page, click the link associated with the objective plan for which you want to create business objective pages).

## Create Business Objectives

Complete the information in the *Home Page Creation Details* section below. Once the creation details have been chosen, select the **Create Page** pushbutton to generate the objective page(s).

**Home Page Creation Details**

**Objective Plan:** Objective Volume testing - Position hierarchy

**Effective Date:** 04/08/2009 

**Template:** Operations Objectives Template 

**Publication Due Date:** 04/15/2009 

**Set Owner to Position Manager**

Position Selection		Customize   Find    First  1 of 1  Last
Position Number	Position Name	
19000001 	President & CEO	+ -

**Create Objective Pages**

Create Business Objectives page

### ***Home Page Creation Details***

- Template** Select the template that you want to use to create objective pages. The system only displays templates that are effective as of the Objective Plan date.
- Publication Due Date** Enter the date that pages owners should complete their page by and submit it for publication.
- Set Owner to Department Manager or Set Owner to Position Manager** This field changes based on the hierarchy method associated to the objective plan you selected. Select this check box to assign the page owner to either department manager or position manager.

### ***Department Selection***

If you selected *Department* as the hierarchy method on the Objective Plan page, the system displays these fields in the grid:

- Set ID** Enter or select the set ID of the department that for which the page will be created.

- Department** Enter or select a department ID. The system displays only active departments in effect as of the effective date of the objective plan.
- Create Objective Pages** Click to create the objective pages for the departments that you selected in the Department Selection grid. The system displays the Create Objective Pages - Confirmation page. This page lets you know which pages have been created and which pages have not been created.

### ***Position Selection***

If you selected *Position* as the hierarchy method on the Objective Plan page, the system displays these fields in the grid:

- Position Number** Enter or select a position number. The system displays only active positions in effect as of the effective date of the objective plan.
- Position Name** Once you select a position, the system displays the position name.
- Create Objective Pages** Click to create the objective pages for the positions that you selected in the Position Selection grid. The system displays the Create Objective Pages - Confirmation page. This page lets you know which pages have been created and which pages have not been created.

## **Confirming the Creation of Objective Pages**

Access the Create Objective Pages - Confirmation page (from the Create Objective Pages page, click Create Objective Pages).

## Create Objective Pages - Confirmation

Home Page Creation Details

**Objective Plan:** Objective Volume testing - Position hierarchy

**Effective Date:** 04/08/2009

**Template:** Operations Objectives Template

### Pages Created

The following Objective Pages have been successfully created.

Selected Positions				
Position Number	Description	Page Owner	Message	Display Position Incumbents
19000001	President & CEO		Page Created Successfully. Page Owner Unassigned.	

### Create Objective Pages - Confirmation page

After clicking on the Create Objective Pages button, this page will show which objective pages were successfully created and which ones failed with a message describing the problem. The same page is used for Department and Position hierarchies.

If you select Department the system displays the Selected Departments group box, which includes these fields: Set ID, Department, Description, Page Owner, and Message. Under a separate heading, this page will also display any pages that were not created.

---

## Managing Business Objectives

This section discusses how to:

- Select objective pages to update or view.
- Update objectives pages.
- View objective pages.

## Pages Used to Manage Business Objectives

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Select Business Objectives Select Objective Plan View Objectives	EPO_PAGE_SELECT EPO_PLAN_SELECT	<ul style="list-style-type: none"> <li>• Manager Self Service, Performance Management, Business Objectives, Manage My Objectives, Select Business Objectives</li> <li>• Workforce Development, Performance Management, Business Objectives, Manage Business Objectives, Select Business Objectives</li> <li>• Self Service, Performance Management, Business Objectives, View Objectives, View Objectives, View Objectives</li> </ul>	Update objective pages. <ul style="list-style-type: none"> <li>• Managers who are owners of pages can use the Manager Self Service path to update information on the objective pages (EPO_PAGE_SELECT).</li> <li>• The ePerformance administrator can update objective pages using the Workforce Development navigation path (EPO_PLAN_SELECT).</li> <li>• Employees can use the Self Service navigation path to view objectives (EPO_PAGE_SELECT).</li> </ul> <p><b>Note.</b> The ePerformance Administrator and managers who own objective pages and can update or view available objectives.</p>
Update Objectives - <Department or Position> View Objectives - <Department or Position>	EPO_MAIN	<ul style="list-style-type: none"> <li>• From the Select Business Objectives page click the Update link and then click OK (Manager Self Service path and Workforce Development path)</li> <li>• From the View Objective page, click the View link (Employee Self Service path).</li> </ul>	Update or add pre-coded or free-form items to the sections and align them to the objectives listed on the page. After making changes, users can also save, cancel, preview, submit for publication, send messages to the owners of business objectives pages, and view different objectives by launching an organizational chart to locate departments that have established business objectives.

Page Name	Definition Name	Navigation	Usage
View Objectives - <Name of Objective>	EPO_MAIN	<ul style="list-style-type: none"> <li>From the Select Business Objectives page select the View link.</li> <li>From the View Objectives page, click the View link.</li> </ul>	From this page you can review the department, period, objective plan, objective owner, title, and template ID associated with the business objective. Users can also click an icon to view the number employees aligned to organizational objectives listed on the page and click a link to launch an organizational chart to locate departments that have established business objectives.

## Selecting Objective Pages to Update or View

Access the Select Business Objectives page (Workforce Development, Performance Management, Manage Business Objectives, Select Business Objectives).

**Manage Business Objectives**

---

**Select Business Objectives**

To Update your Objective Page, select the Update Page hyperlink for that Page. To View the Objective Page, select the View Page hyperlink.

Objective Plan: 2009

**Search Criteria**

Set ID:

Department:

Objectives Owner:

Status:

Business Objectives						
Title	Set ID	Department Description	Status	Objectives Owner	Update Objectives	View Objectives
2009 Objectives for Corporate Consolidations	SHARE	Corporate Consolidations	Page Owner Assigned	Tina Palisco	<a href="#">Update</a>	<a href="#">View</a>

Select Business Objectives page

---

**Note.** This page illustrates what an administrator would see when they access this page using the Workforce Administration navigation paths. Managers and employees who use either the Manager Self Service or Self Service path would see a slightly different page. Administrators can view all Business Objectives pages, regardless of status. Managers and employees can only view Business Objectives pages when they are in a *Published* status.

---

<b>Position or Department</b>	Enter or select the department or position associated with the pages for which you are searching.
<b>Objective Owner</b>	Select the owner of the objective for which you are searching.
<b>Status</b>	Select one of these values: <ul style="list-style-type: none"><li>• <i>In Progress - Assigned</i></li><li>• <i>In Progress - Unassigned</i></li><li>• <i>Published</i></li><li>• <i>Ready To Publish</i></li></ul>
<b>Search</b>	Click to generate a list of pages that match the search criteria.
<b>Update</b>	Click to access the objectives page in update mode.
<b>View</b>	Click to access the objective page in view only mode.

## Updating Objectives Pages

Access the Update Objectives page - <Department or Position> (from the Select Business Objectives page click the Update link associated with the business objective that you want to update).

**Update Objectives**

---

**Department 13170 - Corporate Consolidations**

**Department:** 13170 - Corporate Consolidations  
**Period:** 01/01/2009 **To:** 12/31/2009  
**Objective Plan:** 2009 2009 Business Objectives  
**Template ID:** KCORP Corporate Objectives Template

---

**Effective Date:** 06/18/2009 **View History:**   

**Status:** In Progress - Assigned  
**Title:**

**Objectives Owner:** KU0071 Tina Palisco  
**Owner Title:**

**Alternate Editor:**  

**Comments:**  

---

 [View Different Objectives](#)

---

Update Objective page (1 of 3)

Section 1 - Customer Loyalty

These are the Instructions for the Section on the Objective Page

[Expand](#)      [Collapse](#)      

---

▼ Provide Internal Customers with Accurate and Timely Reports

**Title:** Provide Internal Customers with Accurate and Timely Reports  

**Description :** Provide Corporate consolidations and other organizations with accurate and timely reports so they can file all required financial statements on time.

- Due Date : 12/31/2009

**Aligned To:** Demonstrate Customer Respect and Loyalty  

 This Objective was modified on 2009-04-07

---

Last Modified By: Betty Locherty on 2009-05-29

---

▼ Answer Customer Questions in Timely and Professional Manner

**Title:** Answer Customer Questions in Timely and Professional Manner  

**Description :** Many organizations rely on the finance organization to help them manage their business. Individuals that work in this organization should provide timely and professional assistance to our internal and external customers at all times.

- Due Date : 12/31/2009

**Aligned To:** Ensure Customer Satisfaction  

 This Objective was modified on 2009-04-07

---

Last Modified By: Betty Locherty on 2009-05-29

Update Objective page (2 of 3)

▼ **Section 2 - Profitability**

---

These are the Instructions for the Section on the Objective Page

[Expand](#)      [Collapse](#)      

- ▶ Effectively Manage Department Expense
- ▶ Produce High Quality Financial Reports
- ▶ Follow all Accounting Standards

[+](#) [Add Profitability](#)

▼ **Section 3 - Employee Commitment**

---

These are the Instructions for the Section on the Objective Page

[Expand](#)      [Collapse](#)      

- ▶ Provide Safe Work Environment
- ▶ Provide Competitive Salary and Benefits to Employees
- ▶ Provide Quality Educational Opportunities

[+](#) [Add Employee Commitment](#)

---

 [View Different Objectives](#)

Update Objective page (3 of 3)

- View History**      Select a date from the drop-down list box and click Go to view a different version of the Objectives page. The system opens the View Objectives page in your browser and displays the version of the objectives that you selected.
- Alternate Editor**      Select another employee to act as an alternative editor to allow them access to review and update the objectives.
- Comments**      Use this field to enter any comments related to the objectives on the page or about any changes you are making or suggesting.
- Preview**      Click this button to access the View Objectives page (view-only mode). The system takes the information that you entered on the Update Objectives page and displays it in a new page that shows you how the page will look to other users when it is published.

**Submit for Publication** Click this button to submit the objectives for publication. The system displays the Update Objectives - Submit for Publication Confirmation page. Click OK to submit the page for publication. After the status has changed, you cannot make updates to the Objective Page until after it is published.

**View Different Objectives** Click this link to access the Search for Business Objectives page. The system displays this page as an objectives chart. Use this page to locate departments or positions that have established business objectives.



(aligned items)

Click this icon to view the number employees aligned to the item to which the icon is associated.

**Add <Objective Name>** Click this link to access the Add an Item page. You can either enter a free-form item or a coded item from the Content Catalog. When you are finished, click the Next button to continue.



(alignment chain)

Click this icon to access the Objective Alignment Chain page where you can view the alignment of the item with corporate and departmental objectives.



(item title)

Click this icon to access a new page that lists the details associated with the item (for example, title, description, measurement and so on).

## Viewing Objective Pages

Access the View Objectives - <Name of Objective> page (from the Select Business Objectives page click the View link associated with the business object that you want to view).

**View Objectives**

---

**2009 Objectives for Corporate Consolidations**

Department: 13170 - Corporate Consolidations

Period: 01/01/2009 To: 12/31/2009

Objective Plan: 2009 2009 Business Objectives

Objectives Owner: Tina Palisco

Title: Manager Corp Consolidations

Template ID: KCORP Corporate Objectives Template

---

[View Different Objectives](#)

---

[Expand All](#)      [Collapse All](#)

View Objectives page (1 of 2)

**Section 1 - Customer Loyalty**

---

These are the Instructions for the Section on the Objective Page



**Provide Internal Customers with Accurate and Timely Reports**

**Title:** Provide Internal Customers with Accurate and Timely Reports

**Description:** Provide Corporate consolidations and other organizations with accurate and timely reports so they can file all required financial statements on time.

- Due Date : 12/31/2009

**Aligned To:** Demonstrate Customer Respect and Loyalty  

● This Objective was modified on 2009-04-07

---

Last Modified By: Betty Locherty on 2009-05-29

**Answer Customer Questions in Timely and Professional Manner**

**Title:** Answer Customer Questions in Timely and Professional Manner

**Description:** Many organizations rely on the finance organization to help them manage their business. Individuals that work in this organization should provide timely and professional assistance to our internal and external customers at all times.

- Due Date : 12/31/2009

**Aligned To:** Ensure Customer Satisfaction  

● This Objective was modified on 2009-04-07

---

Last Modified By: Betty Locherty on 2009-05-29

**Section 2 - Profitability**

---

**Section 3 - Employee Commitment**

---

Return
[View Different Objectives](#)

View Objectives page (2 of 2)

**Note.** This page illustrates what an administrator would see when they access this page using the Workforce Administration navigation paths. Employees who use the Self Service path would see a slightly different page.

**Return**

Click this button to return to the Select Business Objectives page.

**View Different Objectives**

Click this link to access the Search for Business Objectives page. The system displays this page as an objective chart. Use this page to locate departments or positions that have established business objectives.



(align items)

Click this icon to view the number employees aligned to the item to which the icon is associated.

## Publishing Business Objectives

This section discusses how to:

- Select objective plans.
- Publish objective pages.
- Confirm publication of objective pages.

## Pages Used to Publish Business Objectives

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Publish Business Objectives - Select Objective Plan	EPO_PLAN_SELECT	Workforce Development, Performance Management, Business Objectives, Publish Business Objectives, Publish Business Objectives - Select Objective Plan	Use this page to enter search criteria to find objective pages that you want to publish.
Select Page to Publish	EPO_PAGE_SELECT	On the Publish Business Objectives - Select Objective Plan page select the link associated with the objective plan for which you want to publish objective pages.	Enter search criteria to locate the objective pages that you want to publish.
Confirm Publication	EPO_PAGE_PUBLISH	From the Select Page to Publish page select the objective pages you want to publish then click the Continue button	Use this page to publish objective pages.

## Selecting Objective Plans

Access the Select Objective Plan page (Workforce Development, Performance Management, Business Objectives, Publish Business Objectives, Select Objective Plan).

**Publish Business Objectives**

**Select Objective Plan**

Choose an Objective Plan by selecting the appropriate hyperlink

Objective Plan		
Objective Plan	Objective Plan Begin date	Objective Plan End Date
<a href="#">Test 2007 Organizational objectives</a>	01/01/2007	12/31/2007
<a href="#">2008 Business Objectives</a>	01/01/2008	12/31/2008
<a href="#">2009 Business Objectives</a>	01/01/2009	12/31/2009
<a href="#">Test Plan - 2008</a>	01/01/2008	12/31/2008
<a href="#">Objective Volume testing - Position hierarchy</a>	01/01/2009	12/31/2009

Select Objective Plan page

Select the link associated with the objective plan for which you want to publish objective pages.

## Publishing Objective Pages

Access the Select Page to Publish page (on the Select Objective Plan page select the link associated with the objective plan for which you want to publish objective pages).

### Publish Business Objectives

## Select Page to Publish

Enter search criteria to find the objective pages that you want to publish. Select the checkbox next to each page you want to publish and then select the Search button to determine the publication distribution method.

Objective Plan: 2009      2009 Business Objectives

**Search Criteria**

Set ID:

Department:

Status:

Select	Title	Set ID	Department Description	Status	Objectives Owner
<input type="checkbox"/>	2009 Objectives for GBI - Commercial	SHARE	Commerical Operations	Ready to Publish	Douglas Lewis
<input type="checkbox"/>	2009 Objectives for Finance & Administration	SHARE	Finance and Administration	Ready to Publish	Jean Parsons
<input type="checkbox"/>	2009 Objectives for Human Resources	SHARE	Human Resources	Ready to Publish	Jeanette Lee

[Select All](#)    [Deselect All](#)

Select Page to Publish page

- SetID**                      For department hierarchies enter or select the setID of the department for which the page will be created.
- Department or Position**    Enter or select the department or position for which the page will be created
- Search**                      Click to generate a list of pages that match the search criteria.
- Continue**                      Select the pages you want to publish and then click this button to go to the Publish Business Objectives - Confirm Publication page.

---

**Note.** Once a page is published, it can be viewed by everyone in the organization.

---

## Confirming Publication of Objective Pages

Access the Confirm Publication page (from the Select Page to Publish page select the objective for which you want to publish objective pages then click the Continue button).

**Publish Business Objectives**

---

**Confirm Publication**

You have chosen to Publish the Objective Pages listed below. To confirm this, select the Publish Pages button.

Business Objectives				
Title	Set ID	Department Description	Status	Objectives Owner
2009 Objectives for the Administration Organization	SHARE	Administration	Ready to Publish	Kathy Wise

    
 [Return](#)

Confirm Publication page

### **Publish Pages**

Click to generate and send email notifications to individuals based on the installation options you selected on the Objective Pages page during installation (Setup HRMS, Install, Country and Product Specific, ePerformance General Settings, Objective Pages).

If you selected Only Notify on First Publication in the general settings for Objective Pages page, the system sends notifications only the first time the objective page is published. Notifications are not sent for subsequent publications of the business objective.

---

## **Cascading Objective Items**

This section provides an overview of the cascading process and discusses how to:

- Select objectives.
- Enter document parameters.

### **Understanding the Cascading Process**

This section discusses:

- Process overview.
- Item updates.

#### ***Process Overview***

ePerformance provides administrators with the ability to cascade objectives from the Business Objective pages to individual performance documents. This process is helpful in doing mass insertion of objective items into the performance documents of individuals.

The number of documents affected depends upon where in the organizational hierarchy from which the item is cascaded. For example, cascading objectives from the CEO or Executive Vice President level could impact thousands of documents in a large organization.

To review the list of documents that will be updated before the system actually updates the database, administrators can run the cascading process in preview mode. If an administrator selects the Preview Cascade Items option on the Select Objectives page, the system generates a report but does not actually cascade the items down to the documents.

Once items are cascaded, the documents display the items that are aligned to the organizational pages and the objectives from which the items were cascaded.

### ***Item Updates***

When an administrator runs the confirmation process, the system stores the objective item details that were cascaded on the documents. For items that are cascaded down to other documents, ePerformance treats these items as mandatory and does not allow users (manager, employee or any participant) to delete items or update the fields that are cascaded down.

When modifications are made to the objectives and the pages are republished, the objective items are syndicated to the documents using the Syndication process which runs automatically during the Publication process.

If the status of the evaluation criteria is *In Progress*, the system updates the item within that document. If the status of an evaluation is *In Progress*, the system updates the item on each evaluation to which the item was cascaded.

There are two pages that the administrator needs to complete before they can run the process:

- Select Objectives:

The administrator uses this page to select the objective page. They then choose the section (if more than one exists). Additionally they can indicate on this page whether or not to preview or confirm the process. Once an administrator enters the page information, the system displays the items from the page and section that was selected. The administrator can then select the items from this page that they want to cascade.

- Document Parameters:

Before running the process, the administrator selects the ePerformance document parameters to which they want to cascade the items. The administrator selects the document type associated with the objective plan. The system automatically enters period begin and end dates from the period dates on the objective plan. The administrator, however, can overwrite these dates if they don't match the dates of the document. However, administrators can choose to not enter the period end date in order to select all documents started on or after begin date until the current date. The section name specifies the section of the documents where objectives items are cascaded. From here administrators can choose the level from which they want to cascade items downward.

---

**Note.** This process does not work as well for organizations that use anniversary dates to drive performance evaluations.

---

When the administrator runs the process, the system selects all documents for employees using the ePerformance Document Parameters that the administrator entered. Assuming the administrator selected the Confirm Cascade Items option, the system cascades the items to the documents that have the status of *In Progress*, which also contain the same content type as the objective section. The system generates a report that displays all employees in the selection method to which the items were successfully cascaded. The system also generates a list of all employees in the selection method to which the items can't be cascaded along with the reasons the cascade was not successful.

---

**Note.** The system will not cascade an item if the status of the document is *Cancelled*.

---

## Pages Used to Cascade Objective Items

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Select Objectives	EPO_SEL_OBJ	Workforce Development, Performance Management, Business Objectives, Cascade Objective Items, Select Objectives	Select the objective items that you want to cascade to individual performance documents from the Business Objective pages.
Document Parameters	EPO_DOC_PARM	Workforce Development, Performance Management, Business Objectives, Cascade Objective Items, Document Parameters	Select the ePerformance document parameters to which you want to cascade business objective items.

## Selecting Objectives

Access the Select Objectives page (Workforce Development, Performance Management, Business Objectives, Cascade Objective Items, Select Objectives).

Select Objectives page

**Objective Plan** Select the objective plan that contains the object items that you want to cascade down to employee documents. The system refreshes the page and then displays the Set ID and Department ID fields if the plan is based on the department hierarchy.

If the objective plan is associated with a position ID, the system displays this field instead of Set ID and Department ID.

**Set ID** The system automatically enters the set ID associated with the objective plan. You can, however select a different set ID if needed.

**Department ID** Enter the department ID associated with the objective plan.

**Position ID** Enter the position ID associated with the objective plan. If the objective plan is associated with a position ID, the system displays this field instead of Set ID and Department ID.

**Cascade Run Type** Select Preview Cascade Items if you want to preview the results of the process but not cascade the items to the documents you select on the Document Parameters page. Select Confirm Cascade Items if you want to run and cascade the items to the documents. The default for this option is Preview Cascade Items.

<b>Section Type</b>	Select the section type associated with the objective plan that you want to cascade down to your organization.
<b>Page Title and Page Owner</b>	The system displays the page title and page owner when you select a value for the Position ID field or the Department ID field.
<b>Section &lt;Name&gt;</b>	When you select a value for the Section Type field, the system displays a list of objectives associated with the objective plan and section. Select the objectives that you want to cascade down to the documents that you select on the Document Parameters page.

## Entering Document Parameters

Access the Document Parameters page (Workforce Development, Performance Management, Business Objectives, Cascade Objective Items, Document Parameters).

Document Parameters page

<b>Document Type</b>	Select the document type associated with the objective plan that you selected on the Select Objectives page.
<b>Section Type</b>	Select a section type to which you want to cascade objective items. The drop-down list box displays all section that have same content type as the section of the Objective page.
<b>Period Begin Date and Period End Date</b>	The system automatically enters period begin and end dates from the period dates on the objective plan. You can, however, overwrite these dates if they don't match the dates of the document. The dates entered here are used to select documents that fall within the range.
<b>Manager ID</b>	This field determines the manager that the system should start at to establish the population of employee documents. The system follows the direct report method used in ePerformance to determine the manager's direct reports.

**Overwrite existing item?** Select this check box if you want to overwrite items that already exist on the documents to which you are cascading items.

**Cascade Levels** Select either *One* or *All* to indicate the number of levels to which you want to cascade items down to the selected documents.

Selecting *All* will cascade items to the documents of all direct and indirect reports of the manager. Selecting *One* will only cascade items to documents of the manager's direct reports.

---

## Administering Business Objectives

This section discusses how to:

- Assign or transfer business objectives.
- Manage the statuses of objectives.
- Review late objectives.
- Review objectives by status.

### Common Elements Used in this Section

**Department** Select the department for which you want to administer an action.

**Objectives Owner** Select the owner of the objectives for which you want to administer an action.

**Status** To filter the search results, select one of these statuses:

- *In Progress - Assigned*
- *In Progress - Unassigned*
- *Inactive*
- *Published*
- *Ready to Publish*

---

**Note.** If you do not select a status, the system displays all objectives regardless of status when you click search. In addition not all statuses are available for selection on every page.

---

**Select** Select the check box associated with the objectives for which you want to initiate an action.

**Continue**

After you select one or more objectives, click this button go to the next page which you can use to notify the page owners of the action that you are taking. If you are assigning the Objectives page to a different owner, the system displays a page that enables you to search for and select an owner.

**Pages Used to Administer Business Objectives**

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Assign/Transfer Business Objectives	EPO_PAGE_SELECT	Workforce Development, Performance Management, Business Objectives, Administer Business Objectives, Assign/Transfer Business Objectives, Assign/Transfer Business Objectives	If there is currently no owner for the Objective page, you can use this page to assign Objectives pages to an owner. In addition you can transfer ownership of Objectives pages that have already been assigned to a different owner.
Manage Objectives Status	EPO_PAGE_SELECT	Workforce Development, Performance Management, Business Objectives, Administer Business Objectives, Manage Objectives Status, Manage Objectives Status	Use this page to delete business objectives, deactivate objectives, lock objectives, reactivate objectives, or unlock objectives.
Review Late Objectives	EPO_PAGE_SELECT	Workforce Development, Performance Management, Business Objectives, Administer Business Objectives, Review Late Objectives, Review Late Objectives	Use this page to search for objectives that have not been published and the published due date is prior to today.
Review Objectives by Status	EPO_PAGE_SELECT	Workforce Development, Performance Management, Business Objectives, Administer Business Objectives Review Objectives by Status, Review Objectives by Status	Use this page to review objectives by status. You can search for Objectives pages that are in any of these statuses: <i>In Progress - Assigned, In Progress - Unassigned, Inactive, Published, and Ready to Publish</i>

**Assigning or Transferring Business Objectives**

Access the Assign/Transfer Business Objectives page (Workforce Development, Performance Management, Business Objectives, Administer Business Objectives, Assign/Transfer Business Objectives, Assign/Transfer Business Objectives).

### Assign/Transfer Business Objectives

Select the action you would like to perform along with any other required information. Depending upon the action selected the Status field may not be available.

**Objective Plan:** 2009      2009 Business Objectives

**Action:** Transfer Business Objectives ▼

**Search Criteria**

**Set ID:** SHARE 🔍

**Department:** 13000 🔍

**Objectives Owner:**  🔍

**Status:** Published ▼

Search
Clear

**Business Objectives**

Select	Title	Set ID	Department Description	Status	Objectives Owner
<input type="checkbox"/>	2009 Objectives for Finance & Administration	SHARE	Finance and Administration	Published	Jean Parsons

[Select All](#)   [Deselect All](#)

Continue

Assign/Transfer Business Objectives page

**Action**

Select one of these actions, enter your search criteria, and then click Search to view a list of objectives:

- *Transfer Business Objectives*
- *Assign Objective Owner*

---

**Note.** The system disables the Objectives Owner and Status fields if you select the *Assign Objective Owner* action.

---

## Managing the Statuses of Objectives

Access the Manage Objectives Status page (Workforce Development, Performance Management, Business Objectives, Administer Business Objectives, Manage Objectives Status, Manage Objectives Status).

### Manage Objectives Status

Select the action you would like to perform along with any other required information. Depending upon the action selected the Status field may not be available.

**Objective Plan:** 2009 2009 Business Objectives

**Action:**

**Search Criteria**

**Set ID:**  

**Department:**  

**Objectives Owner:**  

**Status:**  

**Business Objectives**

Select	Title	Set ID	Department Description	Status	Objectives Owner
<input type="checkbox"/>	2009 Objectives for the Finance Organization	SHARE	Corporate Finance	In Progress - Assigned	Betty Locherty
<input type="checkbox"/>	2009 Business Objectives Sales Administration	SHARE	Sales Administration	In Progress - Assigned	Dominick Osorio

[Select All](#) [Deselect All](#)

#### Manage Objectives Status page

#### Action

Select one of these actions, enter your search criteria, and then click Search to view a list of objectives:

- *Delete Business Objectives*
- *Inactivate Objectives*
- *Lock Objectives*
- *Reactivate Objectives*
- *Unlock Objectives*

---

**Note.** If you select *Reactivate Objectives*, the system automatically selects *Inactive* as the status.

---

## Review Late Objectives

Access the Review Late Objectives page (Workforce Development, Performance Management, Business Objectives, Administer Business Objectives, Review Late Objectives, Review Late Objectives).

### Review Late Objectives

Select the action you would like to perform along with any other required information. Depending upon the action selected the Status field may not be available.

**Objective Plan:** 2009      2009 Business Objectives

**Action:**

**Search Criteria**

**Set ID:**

**Department:**

**Objectives Owner:**

**Status:**

Business Objectives					
Select	Title	Set ID	Department Description	Status	Objectives Owner
<input type="checkbox"/>	2009 Objectives for the Finance Organization	SHARE	Corporate Finance	In Progress - Assigned	Betty Locherty
<input type="checkbox"/>	2009 Business Objectives Sales Administration	SHARE	Sales Administration	In Progress - Assigned	Dominick Osorio

[Select All](#)   [Deselect All](#)

Review Late Objectives page

Select the *Review Late Objectives* action, enter your search criteria, and then click Search to view a list of objectives.

---

**Note.** The system disables the Objectives Owner and Status fields for this action.

---

## Reviewing Objectives by Status

Access the Review Objectives by Status page (Workforce Development, Performance Management, Business Objectives, Administer Business Objectives, Review Objectives by Status, Review Objectives by Status).

### Review Objectives by Status

Select the action you would like to perform along with any other required information. Depending upon the action selected the Status field may not be available.

Objective Plan: 2009      2009 Business Objectives

Action:  ▼

**Search Criteria**

Set ID:

Department:

Objectives Owner:

Status:  ▼

**Business Objectives**

Select	Title	Set ID	Department Description	Status	Objectives Owner
<input type="checkbox"/>	2009 Objectives for the Finance Organization	SHARE	Corporate Finance	In Progress - Assigned	Betty Locherty
<input type="checkbox"/>	2009 Business Objectives Sales Administration	SHARE	Sales Administration	In Progress - Assigned	Dominick Osorio

[Select All](#)    [Deselect All](#)

Review Objectives by Status page

Select the *Review Objectives by Status* action, enter your search criteria, and then click Search to view a list of objectives.

---

## Creating Objectives Summary Data

This section discusses how to create summary data for objectives.

## Page Used to Create Objective Summary Data

Page Name	Definition Name	Navigation	Usage
Create Objectives Summary Data	EPO_OBJ_ALIGN_EXT	Workforce Development, Performance Management, Business Objectives, Create Objectives Summary Data, Create Objectives Summary Data	Use this process to extract data by objective plan that the system will use to generate the Employees Aligned to Business Objectives metric.

## Creating Objectives Summary Data

Access the Create Objectives Summary Data page (Workforce Development, Performance Management, Business Objectives, Create Objectives Summary Data, Create Objectives Summary Data).

Create Objectives Summary Data page

Select the objective plan for which you want to create summary data and then click Run.

---

## Identifying Business Objective Nodes

This section discusses how to:

- Select an objective plan.
- Identify business objective nodes.

---

**Note.** Before you can create Business Objective pages, you must identify the nodes (departments or positions) that are going to have business objective pages.

---

## Pages Used to Identify Business Objective Nodes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Identify Business Objective Nodes - Select Objective Plan	EPO_PLAN_SELECT	Workforce Development, Performance Management, Business Objectives, Identify Objective Nodes, Identify Business Objective Nodes - Select Objective Plan	Select the objective plan for which you want to identify nodes.
Identify Business Objective Nodes	EPO_PAGE_SETUP	Select the link associated with the objective plan for which you want to identify nodes.	Use this page to identify nodes that will have business objective pages.

## Selecting an Objective Plan

Access the Identify Business Objective Nodes - Select Objective Plan page (Workforce Development, Performance Management, Business Objectives, Identify Objective Nodes, Identify Business Objective Nodes - Select Objective Plan).

<b>Identify Business Objective Nodes</b>		
<b>Select Objective Plan</b>		
Choose an Objective Plan by selecting the appropriate hyperlink		
Objective Plan		
Objective Plan	Objective Plan Begin date	Objective Plan End Date
<a href="#">Test 2007 Organizational objectives</a>	01/01/2007	12/31/2007
<a href="#">2008 Business Objectives</a>	01/01/2008	12/31/2008
<a href="#">2009 Business Objectives</a>	01/01/2009	12/31/2009
<a href="#">Test Plan - 2008</a>	01/01/2008	12/31/2008
<a href="#">Objective Volume testing - Position hierarchy</a>	01/01/2009	12/31/2009

Identify Business Objective Nodes - Select Objective Plan page

Click a link associated with the objective plan for which you want to identify business objective nodes. The system displays the Identify Business Objective Nodes page.

## Identifying Business Objective Nodes

Access the Identify Business Objective Nodes page (on the Select Objective Plan page select the link associated with the objective plan for which you want to identify business objective nodes).

### Identify Business Objective Nodes

Enter search criteria to find the Departments that will have Business Objectives and then select Search.

**Objective Plan:**      2009      2009 Business Objectives

**Search Criteria**

**Set ID:**     

**Department:**

Select the checkbox to indicate that the department will have business objectives.

Target Department					
Select	Department	Description	Manager Name	Drill Up	View Chart
<input checked="" type="checkbox"/>	13000	Finance and Administration	Jean Parsons	<a href="#">Drill Up</a>	

Select any children that will also have business objectives.

Direct Reports					<a href="#">Customize</a>   <a href="#">Find</a>      <a href="#">First</a>   1-5 of 5   <a href="#">Last</a>
Select	Department	Description	Manager Name	Drill Down	
<input checked="" type="checkbox"/>	11000	Information Systems	Calvin Roth	<a href="#">Drill Down</a>	
<input checked="" type="checkbox"/>	13100	Corporate Finance	Betty Locherty	<a href="#">Drill Down</a>	
<input checked="" type="checkbox"/>	13160	Finacial Services	Tom Newman	<a href="#">Drill Down</a>	
<input checked="" type="checkbox"/>	14000	Administration	Kathy Wise	<a href="#">Drill Down</a>	
<input checked="" type="checkbox"/>	16000	Corporate Legal	Patrick Seto	<a href="#">Drill Down</a>	

[Select All](#)   [Deselect All](#)

Identify Business Objective Nodes page

**Department**      Select the department or position for which you want to identify nodes.

<b>Search</b>	After you select a department or position, click this button to display the target department and direct reports.
<b>Drill Up</b>	Click to display the department or position and the child nodes that the department or position you originally selected reports up to.
 (organization chart)	Click this icon to access the Search for Business Objectives page which displays a graphical representation of departments or positions that have business objective pages.
<b>Drill Down</b>	Click to display the departments or positions and the child nodes that report to the manager listed in the Manager Name column.
<b>Select</b>	Select the check boxes of the nodes that will have business objective pages.
<b>Review Plan Nodes</b>	Click this button to access the Review Objective Pages page and view the nodes assigned to the objective plan. This page lists the department ID or position, title, and manager's name.

---

## Restarting Objective Batch Processes

This section discusses how to restart an objective batch process.

### Page Used to Restart Batch Processes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Restart Batch Processes	EPO_BATCH_RESTART	Workforce Development, Performance Management, Business Objectives, Restart Batch Processes, Restart Batch Processes	Use this page to restart the Notification and Syndication batch processes.

### Restarting Objective Batch Processes

Access the Restart Batch Processes page (Workforce Development, Performance Management, Business Objectives, Restart Batch Processes, Restart Batch Processes).

### Restart Batch Processes

[Report Manager](#)   [Process Monitor](#)

The following processes are available to be Re-run. Select the process(es) you would like to Re-run and then select Submit.

Processes to be Re-run					
Process Name	Run Date Time	Objective Plan	User ID	Set ID	Hierarchy Method
<input type="checkbox"/> EPO_NOTIFY	04/28/2009 3:43:45PM	H0VOL	PS		P
<input type="checkbox"/> EPO_NOTIFY	04/28/2009 4:03:17PM	H0VOL	PS		P
<input type="checkbox"/> EPO_SYNDICAT	04/28/2009 12:00:00AM	H0VOL	PS		

Restart Batch Processes page

Select one or more processes and then click the Submit button.

## Generating Reports

This section provides an overview of reports in ePerformance, lists a prerequisite for generating reports, and discusses how to:

- Generate missing documents reports.
- Generate late documents reports.

## Understanding Reports in ePerformance

These are the reports that ePerformance provides to assist human resources (HR) administrators in tracking late or missing documents:

- Missing Documents

This report lists documents that were not created for a group of employees that you select by group ID, document type, and date range. Knowing whether documents are missing is important if the HR department has defined desired rating distribution percentages, as the results of the distribution report are not reliable unless everyone in the group has a document and receives a rating during the period.

- Late Documents

Use this report to generate a list of late documents, by document type, for a group of employees. If the current date is greater than the due date and the status of the manager evaluation is not yet complete, the document is reported as late. This report ignores documents that are canceled.

## Prerequisite for Generating Reports

Before running any reports, you must first ensure that the groups of employees for which to run the reports are established. This is essential because the reports run against groups of employees.

### See Also

*PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Group Definitions"

[Appendix D, "ePerformance Reports," page 311](#)

## Pages Used to Generate Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Missing Documents	RUNCTL_EP_RPT	Workforce Development, Performance Management, Reports, Missing Documents Report, Missing Documents	Generate missing documents reports
Late Documents	RUNCTL_EP_RPT	Workforce Development, Performance Management, Reports, Late Documents Report, Late Documents	Generate late document reports

## Generating Missing Documents Reports

Access the Missing Documents page (Workforce Development, Performance Management, Reports, Missing Documents Report, Missing Documents).

Missing Documents page

- Group As Of Date**      Enter a group as of date.  
 The report generates a list of missing documents for employees belonging to the group that is defined in the Group ID field as of the date specified.
- Group ID**              Identify the group of employees to include in the report.
- Document Type**        Select a document type, such as quarterly, annual, or yearly. You define document types on the Document Types page.
- From Date and To Date**    The from and to dates establish a date range that the system uses in conjunction with the period basis to select documents to include in the report. For example, if you define a from and to date range of January 1, 2008 to December 31, 2008, and the period basis is *Period End Date*, the report only selects documents whose period end date falls between those dates.

**Period Basis**

The period basis determines which of the dates on the manager evaluation the system uses when selecting missing documents to publish in the report. Select one of these options:

- Period Begin Date

Select this option to look for employees who do not have a document of the specified type with a period begin date falling within the range that you entered in the From Date and To Date fields.

- Period End Date

Select this option to look for employees who do not have a document of the specified type with a period end date falling within the range entered in the From Date and To Date fields.

- Due Date

Select this option to look for employees who do not have a document of the specified type with a due date falling within the range entered in the From Date and To Date fields.

**Generating Late Documents Reports**

Access the Late Documents page (Workforce Development, Performance Management, Reports, Late Documents Report, Late Documents).

**Late Documents**

Run Control ID: FY09 [Report Manager](#) [Process Monitor](#)

Language: English

**Report Request Parameter(s)**

\*Group As Of Date: 04/09/2009 Group ID: H0GRP1 H0GRP1 for Reports

Document Type: K0ANNUAL Annual Review

Late Documents page

**Language**

Select the language in which you want to generate the report.

**Group As Of Date**

Select the as of date. The report generates a list of late documents for employees belonging to the group that is defined in the Group ID field as of the date specified.

**Group ID**

Enter the group ID of the employees for whom you want to generate the report.

**Document Type**

Select a document type, such as quarterly, annual, or project review. You define document types on the Document Types page.

**See Also**

Chapter 13, "Using Inquiry Pages," page 271

## Chapter 13

# Using Inquiry Pages

This chapter provides an overview of inquiry pages and discusses how to:

- View historical documents.
- View documents for indirect reports.
- View approval status.
- Define data for inquiry pages.
- View rating summaries.
- View document status summaries.
- View detailed calculations of performance results.

---

## Understanding Inquiry Pages

Managers, employees, and human resources (HR) administrators can access different inquiry pages that enable them to view data of interest to their role. This section discusses:

- Manager and employee pages.
- Administrator pages.

### ***Manager and Employee Pages***

Managers and employees can view lists of their completed documents for both performance and development evaluations and can drill down to detail documents.

Additionally, managers can view the approval status of documents for their direct reports and access documents for their indirect reports in view-only mode.

---

**Note.** If PeopleSoft Portal Pack is installed, managers can use the Employee Performance pagelet to view the status of the documents for which they are responsible.

---

### ***Administrator Pages***

The following inquiry pages are designed specifically for HR administrators:

- Rating Distribution Summary page.

Contains preliminary, actual, and desired rating distributions for a group of employees, defined by group ID, in the form of a bar chart. Administrators use this page to determine whether ratings are distributed in the expected manner, and to plan how to bring actual ratings in line with desired ratings.

- Status Summary page.

Contains a pie chart that summarizes the status of documents for a group of employees.

- Debug/Trace Results page.

Lists the detailed calculations that are associated with a particular document. An HR administrator can use this information to debug suspected problems with rating calculations.

---

**Note.** Producing this page can have a significant impact on system performance.

---

## Viewing Historical Documents

This section discusses how to access historical documents.

### Pages Used to View Historical Documents

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Performance Document History	EP_APPR_SELECT	<ul style="list-style-type: none"> <li>• Manager Self Service, Performance Management, Performance Documents, Historical Documents, Performance Document History</li> <li>• Self Service, Performance Management, My Performance Documents, Historical Documents, Performance Document History</li> </ul>	Access completed documents for employees that you manage or for yourself.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Development Document History	EP_APPR_SELECT	<ul style="list-style-type: none"> <li>• Manager Self Service, Performance Management, Development Documents, Historical Documents, Development Document History</li> <li>• Self Service, Performance Management, My Development Documents, Historical Documents, Development Document History</li> </ul>	Access completed documents for employees that you manage or for yourself.
My Historical Evaluations for Others	EP_APPR_OTH_SELECT	<ul style="list-style-type: none"> <li>• Self Service, Performance Management, Other's Performance Documents, Historical Evaluations, My Historical Evaluations for Others</li> <li>• Self Service, Performance Management, Other's Development Documents, Historical Evaluations, My Historical Evaluations for Others</li> </ul>	Access completed documents for multi-participant evaluations in which you participated.

## Accessing Historical Documents

Access the Performance Document History, Development Document History, or My Historical Evaluations for Others page (Manager Self Service, Performance Management, Performance Documents, Historical Documents, Performance Document History).

---

**Note.** These pages are all similar in appearance and usage; only the Performance Document History page is detailed here.

---

### Performance Document History

Listed below are the completed and cancelled documents for which you are the Manager.  
You can access a document by selecting the "Document Type" hyperlink.

**Search for Documents**

Employee First Name:       Last Name:

Period Between:      

---

Performance Documents							Customize   Find   View All	First  1-2 of 2  Last
Employee	Document Type	Begin Date	End Date	Job Title	Status	Rating		
Courtney Osborn	<a href="#">Performance Review</a>	01/01/2001	12/31/2001	Auditor-General	Completed	Exceeds Expectations		
Cynthia Adams	<a href="#">Performance Review</a>	01/01/2001	12/31/2001	Officer-Loan	Completed	Company Maker		

Performance Document History page

### ***Search for Documents***

Enter search criteria to limit which documents appear in the list.

---

**Note.** This page region appears only if you access the page from Manager Self-Service.

---

**Employee First Name and Last Name**      Enter the first and last names of the employee whose documents you want to access.

**Period Between**      Enter a date range for which you want to view documents.

### ***Performance Documents***

Completed documents that meet the selection criteria appear in this list. The information that appears—Employee, Document Type, Begin Date, End Date, Job Title, Status, and Rating—assists you to identify the specific document you want to view. You can click the link under the Document Type column to open the document for viewing.

---

## **Viewing Documents for Indirect Reports**

This section lists the pages used to view documents for indirect reports.

---

**Note.** You can view documents of any status.

---

**See Also**

Chapter 5, "Generating Documents," Accessing Documents, page 104

**Page Used to View Documents for Indirect Reports**

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Document Details	EP_APPR_DETAIL	Manager Self Service, Performance Management, Performance Documents, View-Only Documents, View-Only Documents  Select the effective date for determining employees and click Continue.  Select an employee and click Continue.  Select a document type.	View the document steps and statuses for the selected document. From this page, you can click the View link wherever it appears to view details of the step.

**Viewing Approval Status**

This section lists the pages used to view approval status.

**See Also**

Chapter 11, "Managing Reviews and Approvals," Approving Documents, page 213

**Pages Used to View Approval Status**

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
View Approval Status Summary	EP_APPRAISL_APPR_L	Manager Self Service, Performance Management, View Approval Status, View Approval Status Summary	View a list of all documents for which you are a participant in the approval process.
View Approval Status Detail	EP_APPRAISAL_EE	Select the Performance Document link on the View Approval Status Summary page.	View approval status of a single document.

## Defining Data for Inquiry Pages

This section lists prerequisites and discusses how to:

- Define the desired rating distribution.
- Define the data collection for inquiries.

### Prerequisites

Before you run inquiries to produce reports and graphs, you must:

- Define rating distribution parameters.

Before defining the parameters for the desired rating distribution, define the group for which to produce a ratings distribution report.

---

**Note.** To obtain meaningful rating distribution information, you should use the same rating model and calculation method for all group members. Additionally, an employee should belong to only one group for which you define and evaluate a document result distribution. Therefore, it's important that you carefully define rating distribution groups and use the Group Member Overlap (GBP001) report to identify members with membership in more than one group.

---

- Run the Create Summary Data (EP\_RPT\_SNAP) process to build a collection of data for input to various inquiries and reports.

#### See Also

*PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Group Definitions"

### Pages Used to Define Data for Inquiry Pages

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Setup Rating Distribution	EP_DESIRE_DIST	Workforce Development, Performance Management, Reports, Setup Rating Distribution, Setup Rating Distribution	Define the parameters for generating the Rating Distribution Summary report for a selected group of employees.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Create Summary Data	RUNCTL_EP_RPT_SNAP	Workforce Development, Performance Management, Reports, Create Summary Data	Define the data collection that contains the documents against which inquiries are run. This is a prerequisite for using the Rating Distribution Summary and Status Summary inquiry pages.

## Defining the Desired Rating Distribution

Access the Setup Rating Distribution page (Workforce Development, Performance Management, Reports, Setup Rating Distribution, Setup Rating Distribution).

## Setup Rating Distribution

Group ID: H0GRP1      H0GRP1 for Reports

**Review Rating Model** Find | View All First 1 of 1 Last

\*Effective Date: 01/01/2008

Status: A

Total Pct: 0.00

\*Description: FY08 Rating Distribution

Short Description: FY08 RD

\*Document Type: K0ANNUAL Annual Review

\*Rating Model: PAS Performance Appraisal System

\*Calc Method: Rew Band

**Desired Rating Distribution** Find First 1-5 of 5 Last

Review Rating: 1	Unacceptable	Desired Distribution: <input type="text" value="0.00"/>
Review Rating: 2	Minimally Successful	Desired Distribution: <input type="text" value="0.00"/>
Review Rating: 3	Fully Successful	Desired Distribution: <input type="text" value="0.00"/>
Review Rating: 4	Superior	Desired Distribution: <input type="text" value="0.00"/>
Review Rating: 5	Outstanding	Desired Distribution: <input type="text" value="0.00"/>

Setup Rating Distribution page

The group for which you define the desired distribution parameters appears at the top of the page.

### **Review Rating Model**

For the report to be meaningful, all group members for which you are defining parameters should share the same rating model and calculation method that you select in the following fields.

**Document Type**      Select the type of document for the desired distribution.

**Rating Model**      Select the rating model for the desired distribution.

**Calc Method** (calculation method)      Select the calculation method for the desired distribution. Options are: *Average*, *Revw Band* (review band), or *Sum* (summation).

### ***Desired Rating Distribution***

The desired rating distribution defines, for a given group of employees, the desired percentage of documents that should fall into each rating category or point spread. The selected calculation method determines which fields appear in this group box:

<b>Review Rating</b>	If the calculation method is average or review band, this field displays the document's qualitative ratings from the rating model table.
<b>Description</b>	If the calculation method is average or review band, the description of the qualitative rating appears. The descriptions come from the Rating Model table.
<b>From Points and To Points</b>	These fields appear if the calculation method is summation. Enter the beginning point value and ending point value for the desired distribution. Enter point ranges sequentially; do not leave gaps or enter overlapping point ranges.
<b>Desired Distribution</b>	<p>If the calculation method is summation, enter the percentage of employees that should receive the number of points that are defined by the From Points and To Points fields.</p> <p>If the calculation method is average or review band, enter the percentage of employees that should receive the rating that is specified in the Document Rating field. Distribution percentages must add up to 100.</p>

### ***Examples***

The following examples illustrate how the Desired Distribution field works with the From Points, To Points, and Review Rating fields:

- For five percent of the group members to receive a rating of 10 to 20 points, enter 10 in the From Points field, 20 in the To Points field, and 5 in the Desired Distribution field.
- For five percent of the group members to receive a review rating of O (outstanding), enter five percent in the Desired Distribution field that corresponds to the O rating.

## **Defining the Data Collection for Inquiries**

Access the Create Summary Data page (Workforce Development, Performance Management, Reports, Create Summary Data).

## Create Summary Data

Run Control ID: 1 [Report Manager](#) [Process Monitor](#)

**Report Request Parameter(s)**

\*Group As Of Date:   Document Type:

From Date:   To Date:

**Period Basis**

Period Begin Date

Period End Date

*Group ID	Description	+	-
<input type="text" value="H0GRP1"/> <input type="button" value="Q"/>	H0GRP1 for Reports	+	-

### Create Summary Data page

The Create Summary Data process builds the data collection that is used in the rating distribution and status inquiry pages. You must specify at least a Group ID and a Group As Of Date to run this process; other parameters are available to further refine the data collection.

**Group As of Date** The system summarizes data for employees belonging to the group defined in the Group ID field as of the date specified.

**Document Type** Select a document type, such as quarterly, annual, or yearly. If you leave this field blank, the system selects all document types.

**From Date and To Date** Enter the dates that define a date range for selecting documents to include in the report. These fields work in conjunction with the period basis selection.

### **Period Basis**

**Period Begin Date** Select to have the system retrieve data for documents that have a period begin date that falls between the dates that you enter in the From Date and To Date fields. The period begin date represents the first day of the period and is associated with a document when the document is first created.

**Period End Date** Select to have the system retrieve data from documents that have a period end date that falls between the dates that you enter in the From Date and To Date field. The period end date represents the last day of the period and is associated with a document when the document is first created.

**Group ID****Group ID**

Enter the group ID that is associated with the employees for whom you want to generate the inquiry data. Group IDs are defined as part of the Group Build process in PeopleSoft Enterprise Human Resources.

**Note.** When generating data for the status inquiry pages, PeopleSoft recommends that group members share the same approval process option.

---

## Viewing Ratings Summaries

This section provides an overview on ratings distribution, lists prerequisites, and discusses how to:

- View rating distribution summaries.
- View rating distribution details.

## Understanding Ratings Distributions

The ratings distribution summary report is the most reliable if the documents for everyone in the ratings distribution group are no longer in the *In Progress* status, and that an overall summary rating was entered or calculated on all documents. Additionally, because the rating distribution reports include preliminary ratings, you should ensure that all preliminary ratings are entered.

## Prerequisites

Before you can view a rating distribution summary you must:

- Define the desired rating distribution on the Setup Rating Distribution page.
- Build the data collection from which the rating distribution is generated on the Create Summary Data page.

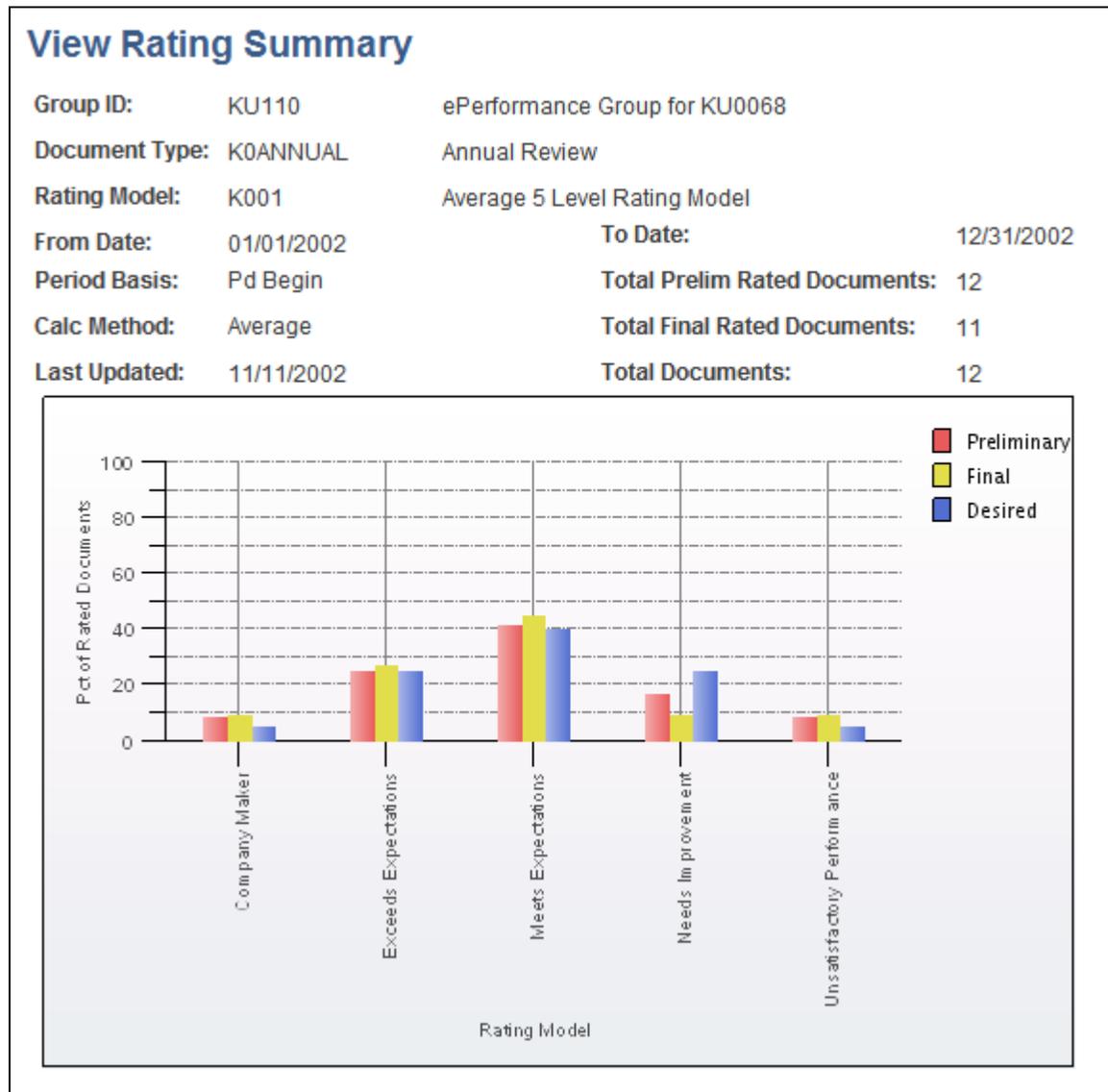
## Pages Used to View Ratings Summaries

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
View Rating Summary	EP_DISTRIB_SUM	Workforce Development, Performance Management, Reports, View Rating Summary	View the preliminary, actual, and desired rating distributions for a group of employees and document type.

Page Name	Definition Name	Navigation	Usage
Rating Distribution Detail	EP_DISTRIB_DTL	Click a bar on the View Rating Summary report.	View details for employees that fall into the selected rating category or point spread on the rating distribution bar chart.

## Viewing Rating Distribution Summaries

Access the View Rating Summary page (Workforce Development, Performance Management, Reports, View Rating Summary).



View Rating Summary page

<b>Group ID</b>	The group ID for the employees whose rating results appear on the page.
<b>Rating Model</b>	The rating model that is used to quantify and evaluate employee performance.
<b>Total Prelim Rated Documents</b> (total preliminary rated documents)	The total number of documents for which preliminary ratings were defined.
<b>Total Final Rated Documents</b>	The total number of documents with final rating results.
<b>Calc Method</b> (calculation method)	The method that is used to calculate ratings. Values are: <i>Summary</i> , <i>Average</i> , and <i>Review Band</i> .
	<hr/> <b>Note.</b> The document template defines the calculation method. <hr/>
<b>Last Updated</b>	The date on which the document rating distribution data that appears on the page was last calculated.
	<hr/> <b>Note.</b> To calculate the data, you must run the Create Summary Data process. <hr/>

### **Bar Chart Data**

The information that the bar chart represents depends on the method that is used to calculate the overall ratings:

- If the calculation method is *Average* or *Review Band*:
  - The vertical axis shows the percentage of completed documents.
  - The horizontal axis shows qualitative rating categories, for example: *Company Maker* or *Exceeds Expectations*.
- If the calculation method is *Summation*:
  - The vertical axis shows the percentage of documents that fall into each point range that is defined on the Desired Rating Distribution page.
  - The horizontal axis shows each from and to point range that is defined on the Desired Rating Distribution page.

For both calculation methods, the bar chart compares preliminary, actual, and desired results. Preliminary results come from the Preliminary Ratings page; actual ratings come from the Manager Evaluation page; desired results come from the Desired Rating Distribution Table page.

Click a preliminary or actual bar to access the Rating Distribution Details page, where you can view detailed information for the selected rating category or point spread.

### **See Also**

Chapter 3, "Setting Up Document Templates," Calculation Methods, page 30

## Viewing Rating Distribution Details

Access the Rating Distribution Detail page (click a bar on the Rating Distribution Summary report).

**Rating Distribution Detail**

Group ID: KU110      ePerformance Group for KU0068

Document Type: Annual Review

Rating Type: Final

Distribution Group: Meets Expectations

Calculation Method: Average

Rating Model: Average 5 Level Rating Model

Distribution Detail								
EmplID	Empl Record	Name	Period Begin Date	Period End Date	Document Status	Approval Status	Preliminary Rating	Final Rating
KU0075	0	David Martignoni	01/01/2002	12/31/2002	CO	NREQ	Meets Expectations	Meets Expectations
KU0079	0	Russell Parker	01/01/2002	12/31/2002	AR	NREQ	Exceeds Expectations	Meets Expectations
KU0081	0	Alain Gasse	01/01/2002	12/31/2002	CO	NREQ	Meets Expectations	Meets Expectations
KU0084	0	Nancy Reed	01/01/2002	12/31/2002	AR	NREQ	Meets Expectations	Meets Expectations
KU0089	0	Sandy Cerruit	01/01/2002	12/31/2002	CO	NREQ	Meets Expectations	Meets Expectations

Customize | Find | View All | First | 1-5 of 5 | Last

### Rating Distribution Detail page

This page lists detailed information for the employees within the rating category or point spread that you selected on the Rating Distribution Summary page.

**Approval Status**      The code for the approval status:

- *NREQ*: Not required
- *OPEN*: Not submitted
- *SUBM*: Submitted
- *APRV*: Approved
- *DENY*: Denied

**Calculation Method**      The calculation method that is used to calculate the overall ratings. Values are *A* (average), *R* (review band), and *S* (summation).

---

## Viewing Document Status Summaries

This section provides an overview of status inquiry page access, lists a prerequisite, and discusses how to:

- View the document status summary.
- View document status details.

## Understanding Status Inquiry Page Access

For the status inquiry pages, group members should share the same approval process option. The approval process option determines when, and if, documents approval is required. It also determines which statuses documents must pass through before they reach the *Complete* status.

To access the Status Inquiry pages, enter either a group ID or a document type to select the employees whose document statuses you want to view. All members of the group should have the same document type. If more than one document template was used to generate the documents, and the review process options differ (for example, some documents hold a review and others do not), then it is possible that not every document that is selected for the report will go through the same set of statuses.

The inquiry pages always represent the correct percentage of documents in each status; however, if more than one review process option is represented, the pages might not give you a complete picture of the statuses through which documents must pass.

## Prerequisite

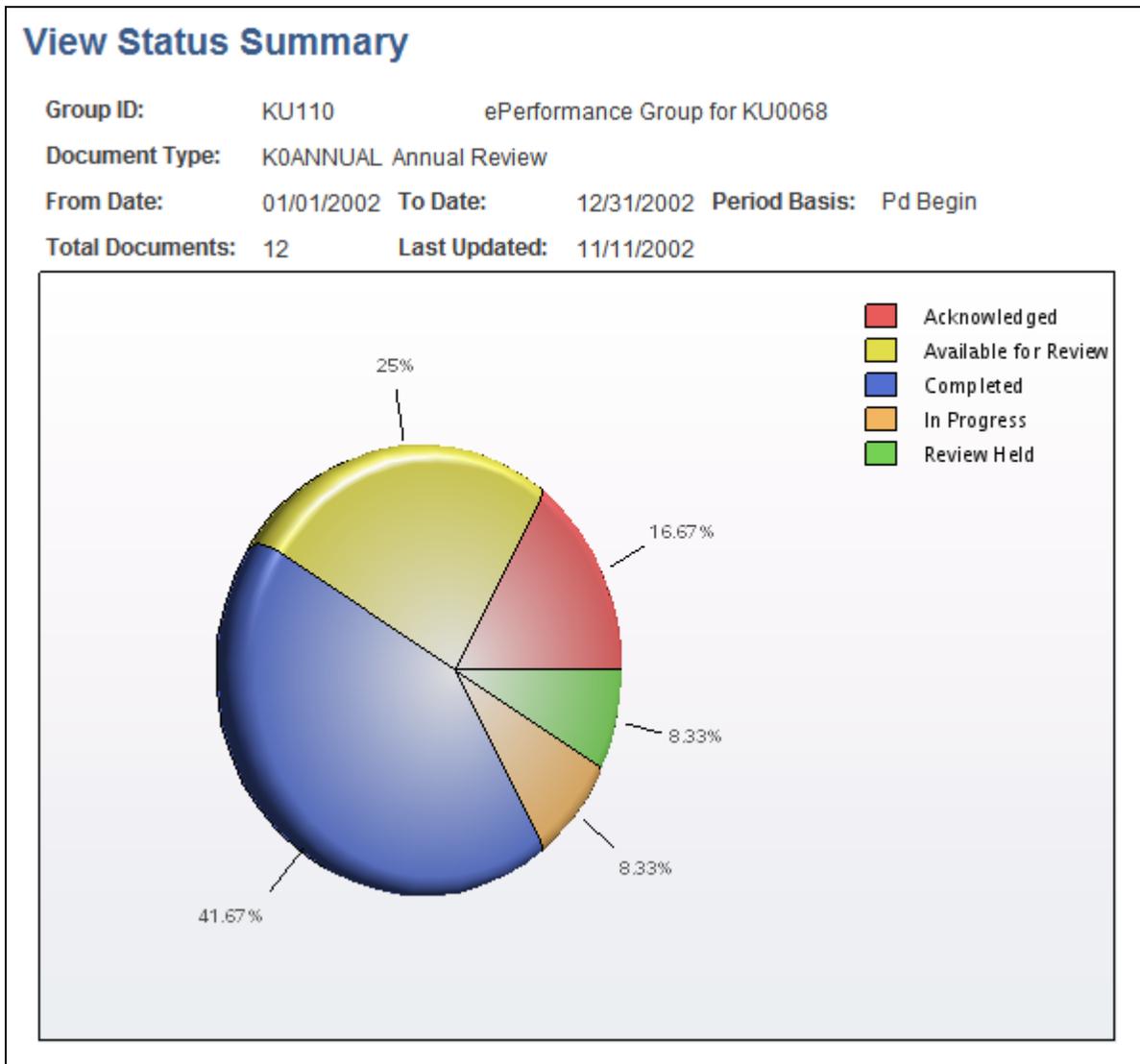
Before you can use inquiry pages to view the status of documents, use the Create Summary Data page to create a snapshot of the data to be used by the inquiry page.

## Pages Used to View Document Status Summaries

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
View Status Summary	EP_STATUS_SUM	Workforce Development, Performance Management, Reports, View Status Summary, View Status Summary	View a pie chart that shows the percentage of documents in each document status. Each wedge represents a document status.
Document Status Detail	EP_STATUS_DTL	Click a wedge in the pie chart on the View Status Summary page.	View the list of employees that comprise the document status selected on the Document Status Summary page. Also see status details for each employee.

## Viewing the Document Status Summary

Access the View Status Summary page (Workforce Development, Performance Management, Reports, View Status Summary, View Status Summary).



View Status Summary page

**Total Documents**                      Displays the total number of documents for which summary results are available.

**Last Updated**                            Displays the date when the document status summary data that appears on the page was last calculated.

---

**Note.** To calculate the displayed data you must run the Create Summary Data process.

---

#### ***Pie Chart Data***

For the selected group and document type, the pie chart displays the percentage of documents that are currently associated with each document status.

Click a wedge to access the Document Status Detail page, where you can see the list of employees with documents in the selected status.

**See Also**

Chapter 11, "Managing Reviews and Approvals," Document Statuses during Review and Approval, page 207

## Viewing Document Status Details

Access the Document Status Detail page (click a wedge in the pie chart on the View Status Summary page).

**Document Status Detail**

Group ID: KU110 ePerformance Group for KU0068

Document Type: K0ANNUAL Annual Review

Document Status: Completed

Status Detail <span style="float: right;">Customize   Find   View All   First 1-5 of 5 Last</span>					
Empl ID	Empl Record	Name	Period Begin Date	Period End Date	Approval Status
KU0070	0	Michelle Kelly	01/01/2002	12/31/2002	NREQ
KU0075	0	David Martignoni	01/01/2002	12/31/2002	NREQ
KU0076	0	Mei Lee	01/01/2002	12/31/2002	NREQ
KU0081	0	Alain Gasse	01/01/2002	12/31/2002	NREQ
KU0089	0	Sandy Cerruit	01/01/2002	12/31/2002	NREQ

Document Status Detail page

This page displays the employee IDs, employee record numbers, employee names, period begin and end dates and the approval statuses for the wedge you selected in the pie chart on the View Status Summary page.

**Approval Status**            The code for the approval status:

- *NREQ*: Not required
- *OPEN*: Not submitted
- *SUBM*: Submitted
- *APRV*: Approved
- *DENY*: Denied

---

## Viewing Detailed Calculations of Performance Results

This section provides an overview of debug/trace logs, lists a prerequisite, and discusses how to:

- View the debug/trace log.

- View calculation information.

## Understanding Debug/Trace Logs

You can view a log of the steps that the system takes to calculate the results of a selected document. This feature can be helpful when you're trying to debug setup problems that are not easily identified by looking at the results of a document calculation.

The system generates a debug/trace log for a document when the user clicks a calculate button on the Maintain Documents page.

When a user first enters the Evaluation page, the system deletes any existing debug/trace information for the subdocument and begins a new trace. The document does not need to be saved to record the debug/trace results; clicking a calculate button automatically saves the results to the log.

Review the results of the debug/trace process after results are calculated and before accessing the Evaluation page for the same subdocument, since accessing the page again deletes the debug/trace data just created.

## Prerequisite

To have the system log calculation entries, the Debug Rating Calculation, you must select the check box on the General Settings page.

---

**Warning!** Enabling this feature can have a significant impact on system performance. We recommend that you use the feature only when you are testing and debugging the ePerformance setup.

---

### See Also

[Chapter 2, "Setting Up ePerformance," Defining System Settings, page 7](#)

## Pages Used to View the Debug/Trace Log

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
ePerformance Debug/Trace Log	EP_DEBUG	Workforce Development, Performance Management, Calculation Debug/Trace Results, ePerformance Debug/Trace Log	View the detailed calculations for a document so that you can debug or trace the calculation.
ePerformance Debug/Trace Log (printable version)	EP_DEBUG_PRNT	Click the Printable Version link on the ePerformance Debug/Trace Log.	Display all calculation information on a single page for convenient printing.

## Viewing the Debug/Trace Log

Access the ePerformance Debug/Trace Log page (Workforce Development, Performance Management, Calculation Debug/Trace Results, ePerformance Debug/Trace Log).

**ePerformance Debug/Trace Log**

Document ID: 284 Role: Manager Log Entry Type:

EmpID: KU0010 Antonio Santos

[Collapse All](#) [Expand All](#) [Send to PeopleSoft](#) [Printable Version](#)

Data [Customize](#) | [Find](#) | [View All](#) | | First 1-4 of 4 Last

[Step Info](#) [Step Detail](#)

Seq		Function	Section	Item	Trace/Debug Message
27	<input type="checkbox"/>	CalcReview()			Calculating Average - Section 1: SectionRating: 3, MaxRating: 5, SectionWeight: 20, Result: 12.0000, Running Result: 12.0000. (257)
28		CalcReview()			Calculating Average - Section 2: SectionRating: 4, MaxRating: 5, SectionWeight: 20, Result: 16.0000, Running Result: 28.0000. (257)
29	<input type="checkbox"/>	CalcReview()			Review Average - MaxRating: 5, Basis: 28.0000, SectionCount 2, Result: 1.4000 (259)
34		CalcReview()			Calculation is not needed. (211)

ePerformance Debug/Trace Log page

**Note.** To access this page you must select the Debug Rating Calculations check box on the ePerformance install page (Set Up HRMS, Install, Product and Country Specific, ePerformance: General Settings, ePerformance) and then perform a calculation on a Manager Evaluation page.

### Log Entry Type

Select a log entry type to filter the output. Options are:

- *Trace:*

Only those entries that show the steps performed in the calculation appear.

- *Info:*

Informational entries only appear. For example, an information entry is created when the system attempts to calculate a section for which none of the subordinate items have been rated. Information entries help explain why a particular result is obtained from a calculation.

- *Errors:*

Errors appear in red and generally indicate a setup problem.

**Printable Version**

Click to render a page that presents all trace information, without tabs, so that you can print a copy.

---

**Note.** When using the browser's File, Print option to print this page, be sure to set the printer layout to landscape mode.

---

**Step Detail Tab**

Click this tab to view the rating model, calculation method, review rating, numeric rating, review points, and the trace/debug messages for the employee.

**Viewing Calculation Information**

Access the ePerformance Debug/Trace Log: Step Detail page (click the Printable Version link on the ePerformance Debug/Trace Log).

ePerformance Debug/Trace Log										
Document ID:		284 Role: Manager		Log Entry Type:						
EmpID:		KU0010 Antonio Santos		<a href="#">Return to Normal View</a>						
Data										
Seq	Function	Section	Item	Rating Model	Calc Method	Review Rating	Numeric Rating	Review Points	Trace/Debug Message	
2	CalcReview()								Calc All Ratings button selected - Begin at 10.53.30.000000. (229)	
27	CalcReview()			K001	Average	M	3.00	6	Calculating Average - Section 1: SectionRating: 3, MaxRating: 5, SectionWeight: 20, Result: 12.0000, Running Result: 12.0000. (257)	
28	CalcReview()			K001	Average	E	4.00	8	Calculating Average - Section 2: SectionRating: 4, MaxRating: 5, SectionWeight: 20, Result: 16.0000, Running Result: 28.0000. (257)	
29	CalcReview()								Review Average - MaxRating: 5, Basis: 28.0000, SectionCount: 2, Result: 1.4000 (259)	
32	CalcReview()			K001	Average	U	1.00		Calc All Ratings button selected - End at 10.53.30.000000 (236)	
33	CalcReview()								Calc All Ratings button selected - Begin at 10.56.04.000000. (229)	
34	CalcReview()								Calculation is not needed. (211)	
35	CalcReview()			K001	Average	U	1.00		Calc All Ratings button selected - End at 10.56.04.000000 %1 (236)	

ePerformance Debug/Trace Log: Step Detail page



## Appendix A

# Archiving Performance and Development Documents

This section provides an overview and instructions on archiving documents.

---

## Understanding Document Archiving

This section discusses:

- Document archiving.
- Delivered archive objects.
- Running the archive process.
- Deleting archived rows.

### **See Also**

*PeopleSoft Enterprise Global Payroll 9.1 PeopleBook, "Archiving Data"*

## Document Archiving

Over the years the number of documents within your organization is likely to grow to an unmanageable number. To help alleviate this problem, PeopleSoft provides a method to archive and delete performance and development documents by country and document type when the document is older than a specified date.

## Delivered Archive Objects

ePerformance delivers these archive objects:

- EP\_APPR\_DOCS
- EP\_APPR\_DOCS\_FPA

ePerformance also delivers the EP\_APPR template. This table lists the archiving records that are delivered.

<b>Description</b>	<b>Archiving Record</b>	<b>History record</b>
Document Header	EP_APPR	EP_APPR_HST
Document Item - Baseline	EP_APPR_B_ITEM	EP_A_B_ITEM_HST
Document Role - Baseline	EP_APPR_B_ROLE	EP_A_B_ROLE_HST
Document Section - Baseline	EP_APPR_B_SEC	EP_A_B_SEC_HST
Document Sub-Item - Baseline	EP_APPR_B_SUB	EP_A_B_SUB_HST
Document Item	EP_APPR_ITEM	EP_A_ITEM_HST
Nominate Participants	EP_APPR_NOMINEE	EP_A_NOMINE_HST
Building Rvw Participant List	EP_APPR_NOM_LST	EP_A_NM_LST_HST
Document Participants	EP_APPR_PARTIC	EP_A_PARTIC_HST
Document Role	EP_APPR_ROLE	EP_A_ROLE_HST
Document Section	EP_APPR_SECTION	EP_A_SECTN_HST
Wkflow for Appraisal SS	EP_APPR_STA	EP_A_STA_HST
Document Sub-Item	EP_APPR_SUBITEM	EP_A_SBITM_HST
ePerformance Attachments	EP_ATTACH	EP_ATTACH_HST
FPS - Employee Review History	FPAREVIEW_HIST	FPARVW_HIST_HST
Federal Review Comments	GVT_EP_COMMENTS	GVT_EP_CMNT_HST

## Running the Archive Process

To archive ePerformance documents, follow these steps:

1. Access the Archive Data to History page (PeopleTools, Data Archive Manager, Archive Data to History).
2. Create a run control ID.
3. Select *EP\_APPR* (ePerformance Docs Archive) as the Archive Template.
4. For archiving by country, document type, and date, choose *Selection* as the Process Type.

5. Select one of the these values:
  - *EP\_APPR\_AR\_CNTY\_DCIND\_DT* (Archive by Cntry, Doc Ind, Dt).
  - *EP\_APPR\_AR\_CNTY\_DCTYP\_DT* (Archive by Cntry, Doc Typ, Dt).
  - *EP\_APPR\_AR\_CNTY\_DT* (Archive by Cntry, Dt).
  - *EP\_APPR\_AR\_DATE* (Archive by Date)
  - *EP\_APPR\_AR\_DCTYP\_DT* (Archive by Doc Typ, Dt)
  - *EP\_APPR\_AR\_EMPLID\_DT* (Archive by Emp Id, Dt)
6. If you are using an Oracle database, select Row Based Processing and then enter a number (usually 10000) in the Commit Frequency field.

---

**Note.** Selecting Row Based Processing is not required for any other platform other than Oracle.

---

7. Click the Define Binds link.
8. Click the Reset Query Bind Variables button.
9. Enter the appropriate information in these fields:
  - Country
  - Document Type
  - Document end date less than

The system archives into the History tables documents that are older than the date you entered.
10. Run the process.

## Deleting Archived Rows

To delete archived ePerformance documents, follow these steps:

1. Access the Archive Data to History page (PeopleTools, Data Archive Manager, Archive Data to History).
2. Create a run control ID.
3. Select *EP\_APPR* (ePerformance Docs Archive) as the Archive Template.
4. To delete old documents, choose *Delete* as the Process Type.
5. From the Batch Number field, select the batch number that was assigned to the archive process.
6. If you are using an Oracle database, select Row Based Processing and then enter a number (usually 10000) in the Commit Frequency field.

---

**Note.** Rows have to be in the History tables to be deleted from Transaction tables.

---

7. Select the Audit Row Count check box.

8. Run the process.

---

**Note.** If you need to restore rows from History tables back to Transaction tables, select *Rollback* as the process type and then select the query that meets your needs. You also need to reset the query bind variable fields (Country, Document Type, Doc end date greater than, and Doc end date less than).

---

## Appendix B

# Delivered Workflow for ePerformance

This appendix discusses workflows for ePerformance.

### **See Also**

*Enterprise PeopleTools PeopleBook: Workflow Technology*

*Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications*

---

## Delivered Workflow for ePerformance

This section discusses ePerformance workflow. The workflows are listed alphabetically by workflow name.

### **See Also**

Chapter 2, "Setting Up ePerformance," Modifying Self-Service Pages and Email Notifications, page 15

## ePerformance Notification Events

This section discusses the ePerformance notification workflow.

### **Description**

<b>Event Description</b>	When employees and managers use ePerformance to create evaluations, this generic notification event is used to support email notifications that are sent to the appropriate participant
<b>Action Description</b>	In ePerformance, workflow notification is configurable at each point in the evaluation process. Available email notifications are sent to inform the appropriate persons of: the availability of evaluations for viewing and update; a change in the status of documents; a request for review and approval of evaluation criteria, participant nominations, or evaluations; invitations to participate in evaluations; and acceptance or declination of invitations.
<b>Notification Method</b>	email



## Appendix C

# Integrating with PeopleSoft Enterprise Learning Management

This appendix discusses how to integrate ePerformance with PeopleSoft Enterprise Learning Management.

---

## Integrating with Learning Management

ePerformance uses the Integration Broker to facilitate communication between the ePerformance and Learning Management systems. Use the following steps to set up the integration between two systems.

---

**Note.** These steps assume that both systems are operating on the same PeopleTools version.

---

1. Using the Human Resources system, define the password for the local node.
  - a. Navigate to PeopleTools, Integration Broker, Integration Setup, Nodes
  - b. Search for the local node.

---

**Note.** For the Human Resources system, PSFT\_HR is delivered as the local node and PSFT\_LM as the remote node. For the Learning Management system, PSFT\_LM is delivered as the local node and PSFT\_HR as the remote node.

---

- c. In the Authentication Option field, select *Password*.
    - d. In the Password field, enter a password.

You will be asked to confirm the password.
    - e. Click the Save button.
2. Verify the routings are active.
  - a. From the Navigations Definitions page, click the Routings tab to display the Routings page.
  - b. In the Routings Definition grid, search for HMCR.
  - c. Verify the *HMCR\_IS* and *HMCR\_OS* are active.

3. Repeat steps 1 and 2 to define the password for the remote node and verify the routings are active.

---

**Note.** The password for the Human Resources remote node should match the password of the Learning Management local node.

The password for the Human Resources local node should match the password of the Learning Management remote node.

---

4. For the remote node only, enable the remote service invocation.
  - a. From the Nodes Definitions page, click the Properties link to display the Nodes Properties page.
  - b. In the Name Type field, select *Category*.
  - c. In the Property Name field, enter *SOA\_ENABLED*.
  - d. In the Value field, enter *True*.
  - e. Click the OK button to display the Node Definition page.
5. Using the Learning Management system, repeat steps 1 through 4.
6. Using the Human Resources system, define the local gateway.
  - a. Navigate to PeopleTools, Integration Broker, Configuration, Gateways
  - b. In the URL field, enter the URL address for the local gateway.

Use the following format: `http://<machine name or IP address>:<jslport>/PSIGW/PeopleSoftListeningConnector`
  - c. Click the Load Gateway Connectors button.
  - d. Click the Save button.
  - e. Click the Ping Gateway button to verify the integration gateway is responding.

7. Configure the gateway.
  - a. From the Gateways page, click the Gateway Setup Properties link.
  - b. In the User ID field, enter *administrator*.
  - c. In the Password field, enter *password*.
  - d. Click the OK button.

The system displays the PeopleSoft Node Configuration page.

- e. Verify that the APP Server URL field is the same as the URL entered in the URL field on the Gateways page, and the User ID and Password fields are the administrator's rights.
- f. In the PeopleSoft Nodes grid, add the message nodes *PSFT\_HR* and *PSFT\_LM*.

To complete the fields in the grid, type <ctrl><J> and copy the tools release and application server information into the corresponding fields. Use the following format for the Web Server URL field:  
//<machine name or IP Address>:<jslport>

---

**Note.** For the PSFT\_LM message node, you will need to access the Learning Management system to type <ctrl><j> so you can get the correct tools release and application server information.

---

- g. Click the Save button.
  - h. Click the OK button.
8. Repeat steps 6 and 7 for the Learning Management system.

The URL of the gateway for the Learning Management system is the same URL address entered for the Human Resources system.

9. Using the Learning Management system, define the single-signon.
  - a. Navigate to PeopleTools, Security, Security Objects, Single Signon.

The system displays the Single Signon page.

- b. Add PSFT\_HR to the Trust Authentication Tokens issued by these Nodes group box.
- c. Click the Save button.

10. Using the Human Resources system, define the single-signon.

- a. Navigate to PeopleTools, Security, Security Objects, Single Signon.

The system displays the Single Signon page.

- b. Add PSFT\_LM to the Trust Authentication Tokens issued by these Nodes group box.
- c. Click the Save button.

11. Using the Human Resources system, verify the nodes are ready to receive transactions.
  - a. Navigate to From the Gateways page, click the Gateway Setup Properties link.
  - b. In the User ID field, enter *administrator*.
  - c. In the Password field, enter *password*.
  - d. Click the OK button.

The system displays the PeopleSoft Node Configuration page.

- e. Click the Ping Node button for both nodes to verify the node is ready to receive transactions.

---

**Note.** If the results for the Ping Node are not successful, go to step 1 to verify that all passwords and the URLs are the same.

---

- f. Repeat this step on the Learning Management system.
12. Using the Human Resources system, identify the target location URL
    - a. Navigate to PeopleTools, Integration Broker, Configuration, Service Configuration
    - b. In the Target Location field, enter the URL address entered in the URL field on the Gateways page.
    - c. Click the Save button.

13. Validate the HMCR\_SYNCH\_PORT message definition

- a. Navigate to PeopleTools, Integration Broker, Integration Setup, Messages
- b. Verify that the fields match the following table.

<b>Message</b>	HMCR_SYNCH_PORT
<b>Version</b>	Version_1
<b>Description</b>	HMCR Synchronous Port
<b>Owner ID</b>	HCM Service Framework
<b>Comment</b>	HCM Service Framework synchronous port
<b>Message Type</b>	Nonrowset-based

14. Verify the schema fields.

- a. From the Message Definition page, click the Schema tab.
- b. Verify that the fields match the following table.

<b>Message</b>	HMCR_SYNCH_PORT
<b>Version</b>	Version_1

15. Verify the HMCR\_FRAMEWORK service.

- a. Navigate to PeopleTools, Integration Broker, Integration Setup, Services
- b. Verify that the fields match the following table.

<b>Service</b>	HMCR_FRAMEWORK
<b>Description</b>	HCM Service Framework
<b>Comments</b>	HCM Service Framework
<b>Object Owner ID</b>	HCM Service Framework
<b>Namespace</b>	http://xmlns.oracle.com/Enterprise/HCM/services
<b>Operation.Default Version</b>	HMCR_SYNCH_PORT.VERSION_1
<b>Description</b>	Default Version
<b>Active</b>	Check box is selected.
<b>Operation Type</b>	Synch.

## 16. Validate the HMCR\_SYNCH\_PORT service operation.

- a. Navigate to PeopleTools, Integration Broker, Integration Setup, Service Operations

The system displays the Service Operation – General page.

- b. Search for HMCR\_FRAMEWORK.
- c. Verify that the fields match the following table.

<b>Service Operation</b>	HMCR_SYNCH_PORT
<b>Service</b>	HMCR_FRAMEWORK
<b>Operation Type</b>	Synchronous
<b>Operation Description</b>	HCM Service Framework Synch.
<b>Operation Comments</b>	HCM Service Framework Synchronous
<b>Object Owner ID</b>	HCM Service Framework
<b>Version</b>	Version_1
<b>Version Description</b>	Default Version
<b>Version Comment</b>	Default Version
<b>Default</b>	Check box is selected
<b>Active</b>	Check box is selected
<b>Type</b>	Request
<b>Message.Version</b>	HMCR_SYNCH_PORT.VERSION_1
<b>Type</b>	Response
<b>Message.Version</b>	HMCR_SYNCH_PORT.VERSION_1

17. Validate the web service access.

- a. From the Service Operation - General page, click the Service Operation Security link.

The system displays the Web Service Access page.

- b. Verify the fields on the page match the following table.

<b>Service</b>	HMCR_FRAMEWORK
<b>Operation</b>	HMCR_SYNCH_PORT
<b>Permission List</b>	<ul style="list-style-type: none"><li>• HCCPHR9000</li><li>• HCCPHR9100</li></ul>
<b>Access</b>	<ul style="list-style-type: none"><li>• Full Access</li><li>• Full Access</li></ul>

- c. Close the window.

## 18. Activate the HMCR\_SYNCH\_PORT handler.

- a. From the Service Operation – General page, click the Handler tab.
- b. In the Handlers grid, select the Active check box for the REQUESTHDLR row.
- c. Click the Detail link.

The system displays the Action Details page.

- d. Validate the fields on the Action Details page match the following table.

<b>Handler Name</b>	REQUESTHDLR
<b>Handler Type</b>	OnRequest
<b>Description</b>	On Synch Request
<b>Comment</b>	On Synch Request
<b>Handler Owner</b>	HMCR
<b>Package Name</b>	HMCR_FRAMEWORK
<b>Path</b>	ServiceFramework:Handlers
<b>Class ID</b>	SynchRequestHandler
<b>Method</b>	OnRequest

- e. Click the OK button.

The system displays the Service Operations - Handlers page.

## 19. Validate routings information.

- a. From the Service Operations - Handlers page, click the Routings tab.
- b. Validate that HMCR\_IS is a row in the Routings Definition grid and the values for the row match the following table.

<b>Sender Node</b>	PSFT_LM
<b>Receiver Node</b>	PSFT_HR
<b>Direction</b>	Inbound
<b>Status</b>	Active

- c. Validate that HMCR\_OS is a row in the Routings Definition grid and that the values match the following table.

<b>Sender Node</b>	PSFT_HR
<b>Receiver Node</b>	PSFT_LM
<b>Direction</b>	Outbound
<b>Status</b>	Active

## 20. Validate the inbound routing definition information.

- a. From the Routings page, click the HMCR\_IS link.  
The system displays the Routings Definition page.
- b. Validate that the Sender Node field is PSFT\_LM.
- c. Validate that the Receiver Node field is PSFT\_HR.
- d. Validate that the Routing Type field is Synchronous.
- e. Validate that the Object Owner ID field is HCM Service Framework.
- f. Validate that the Log Detail field is No Logging.
- g. Validate that the Active check box is selected.

## 21. Validate the inbound external alias information.

- a. From the Routings Definition page, click the Parameters tab.
- b. Verify that the External Alias fields for the Inbound Request and Outbound Response is *HMCR\_SYNCH\_PORT.VERSION\_1*.
- c. Click the Return button.

The system displays the Routings page.

## 22. Validate the outbound routing definition information.

- a. Click the HMCR\_OS link.

The system displays the Routings Definition page.

- b. Validate that the Sender Node field is PSFT\_HR.
- c. Validate that the Receiver Node field is PSFT\_LM.
- d. Validate that the Routing Type field is Synchronous.
- e. Validate that the Object Owner ID field is HCM Service Framework.
- f. Validate that the Log Detail field is No Logging.
- g. Validate that the Active check box is selected.

## 23. Validate the outbound external alias information.

- a. From the Routings Definition page, click the Parameters tab.
- b. Verify that the External Alias fields for the Inbound Request and Outbound Response is *HMCR\_SYNCH\_PORT.VERSION\_1*.
- c. Click the Return button.

The system displays the Routings page.

## 24. Validate the outbound connector properties.

- a. From the Routings page, click the Connector Properties tab.
- b. Verify that the fields match the following table.

<b>Routing Name</b>	HMCR_OS
<b>Service Operation</b>	HMCR_SYNCH_PORT
<b>Service Operation Version</b>	VERSION_1

## 25. Validate the domain status.

- a. Navigate to PeopleTools, Integration Broker, Service Operations Monitor, Administration, Domain Status

The system displays the Domain Status page.

- b. In the Domains grid, validate that the Domain Status field is Active for all machines.

## 26. Repeat steps 9 through 23 using the Learning Management system.

27. Using the Human Resources system, define the portal node information.
  - a. Navigate to PeopleTools, Portal, Node Definition, Portal  
The system displays the Portal page.
  - b. Search for the *PSFT\_LM* remote node.  
Use this format: `http://<machine name or IP address>:<jslport>/psc/ps/`
  - c. In the Content URL Text field, enter the name of the Learning Management machine.  
Use this format: `http://<machine name or IP address>:<jslport>/psc/ps/`
  - d. In the Portal URL Text field, enter the name of the Learning Management machine.  
Use this format: `http://<machine or IP address>:<jslport>/psp/ps/`
  - e. Click the Save button.
28. Using the Human Resources system, clear the cache.
  - a. Navigate to Setup HRMS, System Administration, HCM Registry, Service Registry
  - b. Click the Refresh Cache button.
  - c. Repeat this step on the Learning Management system.  
For the Learning Management system, the navigation is Setup ELM, System Administration, Service Registry.
29. Using the Human Resources system, update the content references to Learning Management.
  - a. Navigate to PeopleTools, Portal, Structure and Content Select the Workforce Development folder
  - b. Select the Workforce Development folder.
  - c. Select the Performance Management folder.
  - d. Select the ELM Learning folder.
  - e. For each content reference, click the Edit link.  
The Content Ref Administration page appears.
  - f. In the Node Name field within the URL Information group box, replace the content with the name of the remote node.
  - g. Click the Save button.
  - h. Repeat this step for all 8 content reference entries.

30. Verify that the access type for the Human Resources.

- a. Navigate to Set Up HRMS, Common Components, Direct Reports for Managers, Configure Direct Reports UI.
- b. For the EP\_APPR\_SELECT, EP\_CREATE\_MY\_DVL, and EP\_CREATE\_MY\_PRF components in the Manager Desktop Transactions group box, click the Configure button to verify that the Access Type field should be *By Part Posn Mgmt Supervisor*.
- c. Click the Save button.

## Appendix D

# ePerformance Reports

This appendix provides an overview of ePerformance reports.

---

**Note.** For samples of these reports, see the PDF files that are published on CD-ROM with your documentation.

---

### See Also

*Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler*

---

## ePerformance Reports: A to Z

This table lists the ePerformance reports, sorted alphanumerically by report ID. The reports listed are all Structured Query Reports (SQRs). If you need more information about a report, refer to the report details at the end of this appendix.

<b>Report ID and Report Name</b>	<b>Description</b>	<b>Navigation</b>	<b>Run Control Page</b>
HEP001 Missing Documents	Create a list of missing documents for a group of employees and a given document type and date range.  <b>Note.</b> A document is reported as missing if it is not created by the mass review creation process or directly by a manager for the date range and document type specified (the report ignores former employees).	Workforce Development, Performance Management, Reports	RUNCTL_EP_RPT

<b>Report ID and Report Name</b>	<b>Description</b>	<b>Navigation</b>	<b>Run Control Page</b>
HEP002 Late Documents	Create a list of late documents for a group of employees and a given document type.  <b>Note.</b> To determine whether a document is late, the system looks at the document due date and compares this date to the current date. If the current date is greater than the due date, and the status of the document is not yet complete, the document is reported as late (the report ignores documents that are canceled).	Workforce Development, Performance Management, Reports, Late Documents Report, Late Documents	RUNCTL_EP_RPT

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