Oracle® Performance Management

Implementation and User Guide

Release 12.2

Part No. E48875-02

November 2013

ORACLE®

Oracle Performance Management Implementation and User Guide, Release 12.2

Primary Author: Gowri Arur

Contributing Author: Suzanne Kinkead, Bina Kulkarni, Krishna Mohan Gowripeddi

Contents

A   Sample Appraisal Scoring Formulas

HRMS Glossary

Index

Send Us Your Comments

Oracle Performance Management Implementation and User Guide, Release 12.2

Part No. E48875-02

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document. Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Oracle E-Business Suite Release Online Documentation CD available on My Oracle Support and www.oracle.com. It contains the most current Documentation Library plus all documents revised or released recently.

Send your comments to us using the electronic mail address: appsdoc_us@oracle.com

Please give your name, address, electronic mail address, and telephone number (optional).

If you need assistance with Oracle software, then please contact your support representative or Oracle Support Services.

If you require training or instruction in using Oracle software, then please contact your Oracle local office and inquire about our Oracle University offerings. A list of Oracle offices is available on our Web site at www.oracle.com.

Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle Performance Management Implementation and User Guide.*

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.

- Oracle HRMS.

   If you have never used Oracle HRMS, Oracle suggests you attend one or more of the Oracle HRMS training classes available through Oracle University

- Oracle Self-Service Web Applications.

- The Oracle Applications graphical user interface.

   To learn more about the Oracle Applications graphical user interface, read the *Oracle E-Business Suite User's Guide*.

See Related Information Sources on page x for more Oracle E-Business Suite product information.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For

information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Structure

1 Oracle Performance Management
A Sample Appraisal Scoring Formulas
HRMS Glossary

Related Information Sources

Oracle HRMS shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other user guides when you set up and use Oracle HRMS.

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle store at http://oraclestore.oracle.com.

Guides Related to All Products

Oracle E-Business Suite User's Guide

This guide explains how to navigate, enter data, query, and run reports using the user interface (UI) of Oracle E-Business Suite. This guide also includes information on setting user profiles, as well as running and reviewing concurrent requests.

Oracle Application Framework Personalization Guide

This guide covers the design-time and run-time aspects of personalizing applications built with Oracle Application Framework.

Guides Related to This Product

Oracle Human Resources Management Systems Enterprise and Workforce Management Guide

Learn how to use Oracle HRMS to represent your enterprise. This includes setting up your organization hierarchy, recording details about jobs and positions within your enterprise, defining person types to represent your workforce, and also how to manage your budgets and costs.

Oracle Human Resources Management Systems Workforce Sourcing, Deployment, and Talent Management Guide

Learn how to use Oracle HRMS to represent your workforce. This includes recruiting new workers, developing their careers, managing contingent workers, and reporting on your workforce.

Oracle Human Resources Management Systems Payroll Processing Management Guide

Learn about wage attachments, taxes and social insurance, the payroll run, and other processes.

Oracle Human Resources Management Systems Compensation and Benefits Management Guide

Learn how to use Oracle HRMS to manage your total compensation package. For example, read how to administer salaries and benefits, set up automated grade/step progression, and allocate salary budgets. You can also learn about setting up earnings and deductions for payroll processing, managing leave and absences, and reporting on compensation across your enterprise.

Oracle Human Resources Management Systems Configuring, Reporting, and System Administration Guide

Learn about extending and configuring Oracle HRMS, managing security, auditing, information access, and letter generation.

Oracle Human Resources Management Systems Implementation Guide

Learn about the setup procedures you need to carry out in order to implement Oracle HRMS successfully in your enterprise.

Oracle Human Resources Management Systems FastFormula User Guide

Learn about the different uses of Oracle FastFormula, and understand the rules and techniques you should employ when defining and amending formulas for use with Oracle applications.

Oracle Self-Service Human Resources Deploy Self-Service Capability Guide

Set up and use self-service human resources (SSHR) functions for managers, HR Professionals, and employees.

Oracle Performance Management Implementation and User Guide

Learn how to set up and use performance management functions. This includes setting objectives, defining performance management plans, managing appraisals, and administering questionnaires.

Oracle Succession Planning Implementation and User Guide

Learn how to set up and use Succession Planning functions. This includes identifying succession-planning requirements, using talent profile, suitability analyzer, and performance matrices.

Oracle Human Resources Management Systems Deploy Strategic Reporting (HRMSi)

Implement and administer Oracle Human Resources Management Systems Intelligence (HRMSi) in your environment.

Oracle Human Resources Management Systems Strategic Reporting (HRMSi) User Guide

Learn about the workforce intelligence Discoverer workbooks.

Oracle Human Resources Management Systems Approvals Management Implementation Guide

Use Oracle Approvals Management (AME) to define the approval rules that determine the approval processes for Oracle applications.

Oracle Human Resources Management Systems Window Navigation and Reports Guide

This guide lists the default navigation paths for all windows and the default reports and processes as they are supplied in Oracle HRMS.

Oracle iRecruitment Implementation and User Guide

Set up and use Oracle *i*Recruitment to manage all of your enterprise's recruitment needs.

Oracle Learning Management User Guide

Use Oracle Learning Management to accomplish your online and offline learning goals.

Oracle Learning Management Implementation Guide

Implement Oracle Learning Management to accommodate your specific business practices.

Oracle Time and Labor Implementation and User Guide

Learn how to capture work patterns, such as shift hours, so that this information can be used by other applications, such as General Ledger.

Oracle Labor Distribution User Guide

Learn how to maintain employee labor distribution schedules, distribute pay amounts, encumber (commit) labor expenses, distribute labor costs, adjust posted labor distribution, route distribution adjustment for approval, and manage error recovery processes. You also learn how to set up effort reporting for Office of Management and Budget (OMB) compliance.

Other Implementation Documentation

Oracle E-Business Suite Maintenance Guide

This guide contains information about the strategies, tasks, and troubleshooting activities that can be used to help ensure an Oracle E-Business Suite system keeps running smoothly, together with a comprehensive description of the relevant tools and utilities. It also describes how to patch a system, with recommendations for optimizing typical patching operations and reducing downtime.

Oracle E-Business Suite Security Guide

This guide contains information on a comprehensive range of security-related topics, including access control, user management, function security, data security, and auditing. It also describes how Oracle E-Business Suite can be integrated into a single sign-on environment.

Oracle E-Business Suite Setup Guide

This guide contains information on system configuration tasks that are carried out either after installation or whenever there is a significant change to the system. The activities described include defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help.

Oracle E-Business Suite Flexfields Guide

This guide provides flexfields planning, setup, and reference information for the Oracle E-Business Suite implementation team, as well as for users responsible for the ongoing maintenance of Oracle E-Business Suite product data. This guide also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on My Oracle Support.

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

You can navigate to the Oracle Integration Repository through Oracle E-Business Suite Integrated SOA Gateway.

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, you

may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

1

Oracle Performance Management

Oracle Performance Management Overview

Oracle Performance Management (OPM) provides an integrated set of performance management functions that encompass objective setting and management (known as Workforce Performance Management), appraisals, and questionnaire administration.

Using Oracle Performance Management, enterprises can:

- Define objectives and track them throughout the year.

- Allocate objectives to individuals based on their role.

- Evaluate an individual's competencies and progress on objectives at a point in time.

- Enable feedback on an individual's performance by multiple participants.

- Monitor the progress of performance evaluation within the enterprise

Workforce Performance Management

The Workforce Performance Management functions encompass the setting, tracking, and assessment of objectives throughout a performance-management period, such as a calendar year. The entity that defines this period and its conduct is the *Performance Management Plan* (PMP). For example, when you publish a PMP, the application generates a *personal scorecard* of objectives for each plan member.

The Workforce Performance Management functions enable you to:

- Create a library of reusable objectives.

- Allocate objectives to workers automatically.

- Cascade objectives through the enterprise hierarchy.

- Record and track objective progress.

- Create appraisals automatically for all members of a PMP.

- Assess objectives during appraisals.

Managers and workers use the self-service Performance Management function to access their Performance Management Task Lists. The list contains tasks, such as Set Objectives and View and Track Objective Progress, that drive the performance-management activity for a single PMP.

When workers create objectives and add objectives' details, their managers can update the objectives and objectives' details. Your enterprise has the flexibility to determine whether managers can update the objectives and objectives' details added by workers using the HR: Allow Updates to Objective Details Added by Appraisee profile option.

Appraisals

The appraisal, during which you can evaluate a worker's current competencies, set or assess objectives, identify training to address deficiencies, and assess a worker's advancement potential, is a key performance-management activity: It provides an up-to-date inventory of worker competencies, and it allows you to specify improvement targets and methods to meet enterprise goals.

You can create the components of the appraisal process, in particular the assessment template, the competency assessment template, and the objective assessment template, and perform related setup tasks. To perform the appraisal itself, you use Oracle Performance Management.

Managers and workers use the self-service Appraisals function to define and conduct the appraisal process. Managers use this function to initiate and manage appraisals of their subordinates. Workers use this function to initiate appraisals of themselves. Both workers and managers use this function to participate in appraisals as appraisers, reviewers, or other participants.

Questionnaire Administration

Oracle Performance Management enables you to create and administer questionnaires for the various potential participants in the appraisal process, the main appraiser, appraisee, reviewers, and other participants.

Integration with Oracle HRMS

Using Oracle HRMS, you can:

- Create proficiency rating scales to assess competencies during an appraisal.

- Create definitions of competencies recognized and required by your enterprise to

meet business goals.

- Define competency requirements for business groups, jobs, organizations, and positions. You can compare an individual's competencies with those required for a job or position, for example, to assist with promotion, training, or compensation plans.

- Define all qualification types your enterprise recognizes.

- Define the career-progression routes available to workers in your enterprise.

Integration with Oracle Self-Service HR (SSHR)

Managers can use the self-service Competency Profile function to update the competency profiles of their subordinates. Employees can use this function to update their own competency profiles. Managers and HR Professionals can use the self-service Suitability Matching function to find a person for a work opportunity or a work opportunity for a person. Both managers and employees can use the self-service Employee Review function to set up review meetings and invite reviewers to attend.

Integration with Oracle Learning Management

You can recommend a learning path for the appraisee using Oracle Learning Management (OLM).

Integration with Oracle Compensation Workbench

Compensation managers can view the completed Performance Management appraisal details from the Compensation Workbench allocation worksheet. Managers can view their employees' latest completed Performance Appraisals from Oracle Compensation Workbench without having to switch responsibilities to access Performance Management.

See: Viewing Appraisal Details in Compensation Workbench, *Oracle HRMS Compensation and Benefits Management Guide*

Info Online Links to Enwisen

You can configure access between Oracle Performance Management and Enwisen, a third-party information provider to enable end users to access company specific information or any other relevant information hosted on the Enwisen web site. The Info Online content container displays hypertext links to information providers. The Performance Management page available from the Manager Self-Service and Employee Self-Service responsibilities contains the Info Online content container, which is hidden default. This content container includes the Handbook link (default link) to access, for example, your company's information on performance appraisals.

Performance Management Key Concepts

- Appraisals Overview, page 1-154

- Workforce Performance Management, page 1-63

- The Objectives Library, page 1-103

- Performance Management Plans, page 1-73

- The Appraisal Template, page 1-187

- Info Online Links to Enwisen from Oracle Performance Management Pages, page 1-59

Oracle Performance Management Requirements

Can I create Performance Management Plans (PMP) to suit our business requirements?

Using Oracle Performance Management, you can manage workforce performance for a specified period of time, such as a calendar or financial year, and for a specified workforce, such as all workers in a supervisor hierarchy or in an organization.

To define performance-management activities, you can define Performance Management Plans (PMP). A PMP is a configurable control document that defines:

- Objective-setting and objective-tracking processes

- Appraisal-management processes

You select both options in your PMP to take full advantage of the performance-management functions. Alternatively, you can define a PMP to manage objectives only or appraisals only. You can define as many PMPs as the enterprise requires, and a worker can belong to multiple PMPs.

Can I edit performance management plans?

After you publish a performance management plan, you can edit the plan, for example, to change the Appraisal Task start date. However, certain restrictions apply.

See: Updating Performance Management Plans, page 1-81

Can I perform administrative tasks after Performance Management Plans are published?

Using the Performance Management Plan Administration Home Page, performance management plan administrators can perform the following tasks for published

performance-management plans:

- Enroll workers into published plans

- Remove worker scorecards

- Reopen worker scorecards

- Refresh worker scorecards

- Reopen appraisals of workers

Additionally, administrators can also roll back published performance management plans.

Can I define objectives once for the enterprise?

Yes. HR Professionals can define reusable objectives in the Objectives Library. Managers and workers can copy objectives from the Objectives Library to workers' *personal scorecards of objectives*.

What are personal scorecards?

A personal scorecard comprises the objectives of a single worker associated with a single Performance Management Plan (PMP). Workers who belong to more than one PMP have multiple personal scorecards. Also, a worker can have more than one personal scorecard from a single PMP if the worker has multiple assignments and the plan does not apply to primary assignments only.

The application generates a worker's personal scorecard when the HR Professional first publishes the PMP. At that time, the scorecard status is either Not Started: With Manager or Not Started: With Worker, depending on the objective-setting method. In a cascading objective-setting process, managers start the updating process; in a parallel objective-setting process, workers start the objective-setting process.

Can I allocate objectives automatically to my workforce?

Yes. When you create a Performance Management Plan (PMP), you identify the members of the plan (for example, all members of an organization or all workers in a specified supervisor hierarchy) and indicate whether the plan members should automatically receive objectives from the Objectives Library for which they are eligible.

Can I track worker progress with objectives?

Yes. Throughout the performance-management period, managers and workers can both view and update a worker's progress. For example, a worker can indicate that an objective is 50 percent complete and add comments about the objective achievement. The worker's manager can view this information and make changes as required.

To what extent can the appraisee be involved in the appraisal process?

The appraisal is the product of collaboration between the main appraiser and the appraisee. The main appraiser shares the appraisal with the appraisee and specifies which sections of the appraisal the appraisee can view, whether the appraisee can update the appraisal, and whether the appraisee can provide feedback on their final ratings. The appraisee, after making any permitted changes to the appraisal, shares the appraisal with the main appraiser to return it. This sharing of the appraisal between the main appraiser and the appraisee can occur as often as necessary during a single appraisal process.

The sharing functions, combined with the appraisee feedback function, encourage discussion throughout the appraisal process. Nonetheless, the appraisals functions are flexible enough also to support the traditional appraisal model, where dialog between the main appraiser and the appraisee is less important. In allowing the main appraiser to select which information to share and when, Oracle Performance Management gives the main appraiser complete control of the appraisal process.

Can I use appraisal templates throughout the enterprise?

The appraisal template is the design document for an appraisal. Its main function is to configure all sections of the appraisal to suit the appraisal purpose or enterprise requirements: you can use a single appraisal template throughout the enterprise.

HR Professionals can create and maintain appraisal templates, competency-assessment templates, and objective-assessment templates using these functions:

- Manage Appraisal Templates

- Manage Competency Templates

- Manage Objective Templates

Can I create appraisals efficiently?

Yes. Managers and workers can create individual appraisals using the self-service Appraisals function. Alternatively, the application can create appraisals automatically for all members of a PMP.

Can I complete appraisals offline?

Yes. Main appraisers, appraisees, and other participants can download in-progress appraisals in Microsoft Excel format, update the appraisals without connecting to the application (for example, away from the workplace), and upload them later. They can download sections of the appraisal, such as competencies, objectives, and questionnaires that require time and privacy to complete.

How do I include a questionnaire in an appraisal?

To define a questionnaire, you access the Questionnaire Administration function from the HR Professional menu. When you define an appraisal template, you can select the questionnaire you defined. The questionnaire must have the status Published.

Oracle Performance Management provides the following Questionnaire Administration modules that are available with the HR Professional responsibility by default:

- Questionnaire Administration (HR_QUEST_ADMIN_SS)

  See: Questionnaire Administration, page 1-202

- Questionnaire Administration - New (HR_QUEST_ADMIN_NEW_SS)

  See: Using the Questionnaire Administration - New Functionality, page 1-204

  Depending on your business requirements, you can use the relevant Questionnaire Administration module. See: Implementing Oracle Performance Management, page 1-8

Can I view appraisal ratings in my organization?

Managers can use the Performance Management Plan Appraisal Rating Summary to track progress of appraisals in their hierarchy.

Implementing Performance Management

Oracle Performance Management Licenses

If you purchased a Self-Service HR license prior to June 18th, 2007 and have an Oracle Human Resources (HR) license, you can use Oracle Performance Management. The purchase of a Self-Service HR license on or after June 18th, 2007 does not permit the use of Performance Management. You must purchase a separate Performance Management license in addition to an Oracle Self-Service Human Resources (SSHR) license to use the following features:

- Workforce Performance Management includes Objectives Management

- Appraisals

- Questionnaire Administration

Implementing Oracle Performance Management

This topic discusses the steps that you must complete to use Oracle Performance Management.

Prerequisites

Before implementing Oracle Performance Management, you must install Oracle HRMS and Oracle Self-Service HR, which are prerequisites

See: Implementation Checklist for Oracle HRMS, *Oracle HRMS Implementation Guide*

See: Implementation Steps for Self-Service HR (SSHR), *Oracle HRMS Deploy Self-Service Capability Guide*

Licensing Information for Oracle Performance Management

If you purchased a Self-Service HR license prior to June 18th, 2007 and have an Oracle Human Resources (HR) license, you can use Oracle Performance Management. The purchase of a Self-Service HR license on or after June 18th, 2007 does not permit the use of Performance Management. You must purchase a separate Performance Management license in addition to an Oracle Self-Service Human Resources (SSHR) license to use the following features:

- Workforce Performance Management includes Objectives Management

- Appraisals

- Questionnaire Administration

Set up Talent Management

You must define competencies and qualifications required for Performance Management.

See: Talent Management, *Oracle HRMS Implementation Guide*

Set up Workforce Performance Management

The Workforce Performance Management functions enable enterprises to set worker objectives that are aligned with the business strategy and goals.

See: Setting Up Workforce Performance Management, page 1-68

Set up Appraisals

During the appraisal process, you can assess a worker's competencies and objectives and identify development opportunities for the next appraisal period.

See: Setting Up the Appraisal Process, page 1-183

Using the Required Questionnaire Administration Module

Oracle Performance Management provides the following Questionnaire Administration modules that are available with HR Professional responsibility by default:

- Questionnaire Administration (HR_QUEST_ADMIN_SS)

  See: Questionnaire Administration, page 1-202

- Questionnaire Administration - New (HR_QUEST_ADMIN_NEW_SS)

  See: Using the Questionnaire Administration - New Functionality, page 1-204

  > **Note:** Both Questionnaire Administration and Questionnaire Administration - New functions are delivered by default with the HR Professional responsibility. The parameter pQuestType=NEW with the default value 'NEW' distinguishes Questionnaire Administration - New function from the existing Questionnaire Administration function. The application uses this parameter value to load the relevant Questionnaire Administration pages. If the pQuestType=NEW parameter is removed from the HR_QUEST_ADMIN_NEW_SS function, then the application retrieves the HR_QUEST_ADMIN_SS Questionnaire Administration function.

Depending on your business requirements, you can use the relevant Questionnaire Administration module.

Set up International (Hijrah and Thai Buddhist) Calendars, if required

By default, the calendar in the Date Picker shows the Gregorian calendar. If required, you can enable the Hijrah or Thai Buddhist calendar by defining the following profile options:

- FND: Forms User Calendar: Choose a preferred calendar.

- FND: Calendar Week Start Day: Choose the first day of the week.

  > **Note:** Setting these profile options not only impacts the date picker fields but also the read-only date fields. All the date fields in the application will display the date format based on the profile definitions.

For information on how to set these profile options, refer to the Support for Calendars topic in the *Oracle E-Business Suite Setup Guide* and the *Hijrah and Thai Calendar Support in Oracle E-Business Suite Release 12.1* (Doc ID 807393.1) note on My Oracle Support.

Key Concepts

See:

- User Access and Security in Oracle Performance Management, page 1-15

- Profile Options in Oracle Performance Management, page 1-22

Oracle Performance Management Supplied Functions

This topic lists the predefined menus and functions supplied with Oracle Performance Management.

Supplied Menus

Employee Self-Service Responsibility

Using the Employee Self-Service responsibility, workers can access:

Functions available with the Employee Self Service menu

Prompt	Function	Function Name	Web HTML Call	Parameters
Performance Management	Employee: Performance Management Page	HR_EMP_TALM GMT_SS	OA.jsp?page=/oracle/apps/per/selfservice/talentmanagement/webui/EmpTalentManagementPG&OAFunc=HR_EMP_TALMGMT_SS&OAHP=HR_EMP_TALMGMT_HMPAGE_SS&OASF=HR_EMP_TALMGMT_SS	None
Appraisals	Employee: My Appraisals Page	HR_EMP_MY_APPR_SS	OA.jsp?page=/oracle/apps/per/selfservice/appraisals/webui/EmpMyAppraisalsPG&OAFunc=HR_EMP_MY_APPR_SS&OAHP=HR_EMP_TALMGMT_HMPAGE_SS&OASF=HR_EMP_MY_APPR_SS	None

Manager Self-Service Responsibility

Using the Manager Self-Service responsibility, managers can access:

Functions available with the Manager Self-Service menu

Prompt	Function	Function Name	Web HTML Call	Parameters
Appraisals	Manager: Main Appraiser Page	HR_MGR_MN_APPR_SS	OA.jsp?page=/oracle/apps/per/selfservice/appraisals/webui/MgrMainAppraiserPG&OAFunc=HR_MGR_MN_APPR_SS&OAHP=HR_MGR_TALMGMT_HMPAGE_SS&OASF=HR_MGR_MN_APPR_SS	None
Performance Management	Manager: Performance Management Page	HR_MGR_TALMGMT_SS	OA.jsp?page=/oracle/apps/per/selfservice/talentmanagement/webui/MgrTalentManagementPG&OAFunc=HR_MGR_TALMGMT_SS&OAHP=HR_MGR_TALMGMT_HMPAGE_SS&OASF=HR_MGR_TALMGMT_SS	None
	View Appraisals Manager	HR_VIEW_APPRAISALS_MGR_SS	OA.jsp?page=/oracle/apps/per/selfservice/enterprocess/webui/PersonTreePG&akRegionApplicationId=800&&pPersonID=&pFromMenu=Y&pManagerEnabled=N&pCalledFrom=HR_VIEW_APPRAISALS_PAGE_SS	None

Prompt	Function	Function Name	Web HTML Call	Parameters
	View Appraisals Page	HR_VIEW_APPR AISALS_PAGE_S S	OA.jsp?page=/ora cle/apps/per/selfs ervice/appraisals/ webui/ViewAppr aisalsPG&akRegi onApplicationId= 800&pCalledFro m=HR_VIEW_AP PRAISALS_PAG E_SS&pPersonID =&OAFunc=HR_ VIEW_APPRAIS ALS_PAGE_SS	None
Appraisal Summary Page	Appraisal Summary Page	HR_APPR_SUM MARY_SS	OA.jsp?page=/ora cle/apps/per/wp m/webui/WPMA ppraisalSummary PG&akRegionAp plicationId=800	None

HR Professional V4.0 Self-Service Responsibility

Using the HR Professional V4.0 responsibility, HR Professionals can access:

Functions available with the HR Professional menu

Prompt	Function	Function Name	Web HTML Call	Parameters
Questionnaire Administration - New	Questionnaire Administration - New	HR_QUEST_AD MIN_NEW_SS	OA.jsp?page=/or acle/apps/per/sel fservice/question naire/webui/Que stOverviewPG	None
Appraisals	View Appraisals Manager - HR Sys Admin	HR_VIEW_SYSA PPR_MGR_SS	OA.jsp?akRegio nCode=HR_PER SON_SEARCH_ TOP_SS&akRegi onApplicationId =800	pPersonID=&pFr omMenu=Y&pM anagerEnabled= N&pCalledFrom =HR_VIEW_SYS APPR_PAGE_SS &pIsHRProf=Y

Prompt	Function	Function Name	Web HTML Call	Parameters
Questionnaire Administration	Questionnaire Administration	HR_QUEST_AD MIN_SS	OA.jsp?page=/or acle/apps/per/sel fservice/question naire/webui/Que stOverviewPG	None
Performance Management	Hr Manager: Performance Management Page	HR_HRMGR_T ALMGMT_SS	OA.jsp?page=/or acle/apps/per/sel fservice/talentma nagement/webui /HrTalentManag ementPG&OAFu nc=HR_HRMGR _TALMGMT_SS	None
Manage Appraisal Templates	Manage Appraisal Templates	HR_MANAGE_ APPR_TEMPLA TE_SS	OA.jsp?page=/or acle/apps/per/sel fservice/apprtem plate/webui/Sear chApprTemplate PG&akRegionA pplicationId=800	None
Manage Competency Templates	Manage Competency Templates	HR_MANAGE_ ASMNT_TEMPL ATE_SS	OA.jsp?page=/or acle/apps/per/sel fservice/asmntte mplate/webui/Se archAsmnttempl atePG&akRegion ApplicationId=8 00	None
Manage Objective Templates	Manage Objective Templates	HR_MANAGE_ OBJ_TEMPLATE _SS	OA.jsp?page=/or acle/apps/per/sel fservice/asmntte mplate/webui/Se archObjectiveTe mplatePG&akRe gionApplicationI d=800	None

Prompt	Function	Function Name	Web HTML Call	Parameters
	WPM: Concurrent Request Log Display Page	HR_WPM_CONC_REQ_LOG_PG	OA.jsp?page=/oracle/apps/per/wpm/common/webui/HrAdminConcReqLogPG&OAFunc=HR_WPM_CONC_REQ_LOG_PG	None
	Appraisal Summary Page	HR_APPR_SUMMARY_SS	OA.jsp?page=/oracle/apps/per/wpm/webui/WPMAppraisalSummaryPG&akRegionApplicationId=800	None
	Hr Administrator Home page	HR_WPM_ADMIN_ACTION_SS	OA.jsp?page=/oracle/apps/per/wpm/common/webui/HrAdminHomePG&akRegionApplicationId=800	None
Mass Change Main Appraiser Use this function to perform mass change of main appraiser of appraisals created using the Appraisals function.	Mass Change Main Appraiser	HR_MAIN_APP_CHANGE_SS	OA.jsp?page=/oracle/apps/per/selfservice/appraisals/webui/ChangeMainApp&OAFunc=HR_MAIN_APP_CHANGE_SS	None

User Access and Security in Oracle Performance Management

This topic identifies the key concepts relating to Oracle Performance Management user access and security and provides information on how to apply these concepts to address the needs of your enterprise.

Oracle Performance Management uses the same security mechanisms as Oracle HRMS applications. By defining user profiles, security profiles, responsibilities, and menu

structures, you can control who uses Oracle Performance Management, which information they can access, and how they access it. See: Security Overview, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Responsibilities

For information on responsibilities to use Oracle Performance Management, see: Oracle Performance Management Supplied Functions, page 1-10

Users

You define users for Oracle Performance Management in the same way as you define users for other Oracle HRMS applications. See: Users Window, *Oracle E-Business Suite Security Guide*. The Person field of the Users window is important for self-service applications as it acts as the link between the professional forms interface and the self-service application. This link enables the application to recognize who is using Oracle Performance Management. For example, if a user's name is entered in the Person field, the user's name is displayed on the homepage.

Security Models

Oracle HRMS provides two different security models which enable you to set up security specifically for your enterprise: Standard HRMS security and Security Groups Enabled security (formerly called Cross Business Group Responsibility Security). Assess the requirements of your enterprise and set up the required security model.

See: Security Models, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Security Profiles

By assigning the appropriate security profiles, you can determine the business groups and organizations that plan administrators, managers, and workers can access. Define security profiles based on the requirements of your enterprise.

See: Security Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Identification of Plan Population for Performance Management Plans

You must define supervisor hierarchies to use the performance management plans feature. The supervisor for a worker (employee or contingent worker) is the person identified in the Supervisor field in the Assignment window in Oracle HRMS.

As a plan administrator, when you create plan details, on the Create Plan: Population page, you identify the plan members by selecting part or all of a hierarchy: organization, position, or supervisor. Currently, when you select either the organization

or position hierarchy to identify the plan population, the application uses the selected organization or position hierarchy to publish the plan. After the plan is published to the selected population, the application uses supervisory hierarchy for the following tasks:

• Set objectives for plan members

• Create appraisals for plan members

  Note that when plan administrators switch as a manager or an employee, they cannot access the Manage Appraisals task.

  > **Important:** When you create a plan, you must ensure that the manager is part of the plan population. Otherwise, the plan is not published to the manager and the manager will not have access to any of the plan tasks and cannot access scorecards or appraisals of workers down the supervisor hierarchy.

The following examples explain how the performance management plans feature works.

This example uses Vision Global, a global enterprise that has operations across geographies and countries. The following diagram is a graphical representation of the Vision Global enterprise.

Vision Global
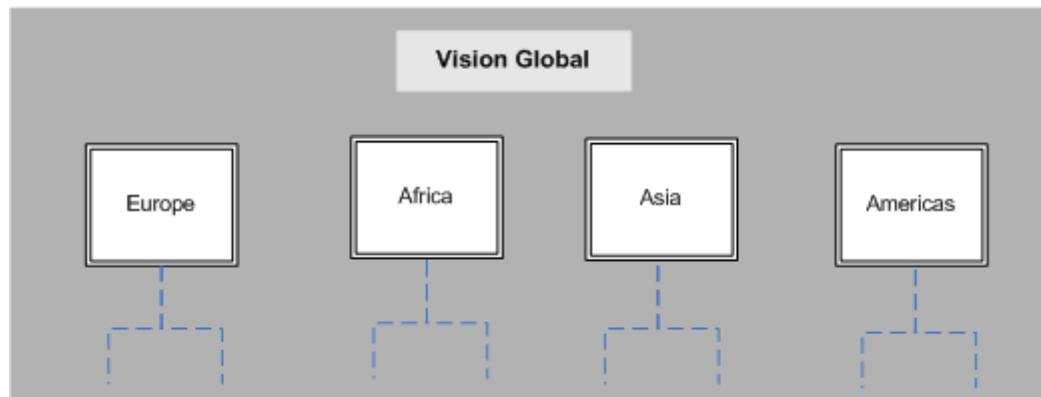
Let us look at the Americas region, which includes the following countries and business groups. The following diagram is a graphical representation of the Americas region of the Vision Global enterprise.

Americas Region
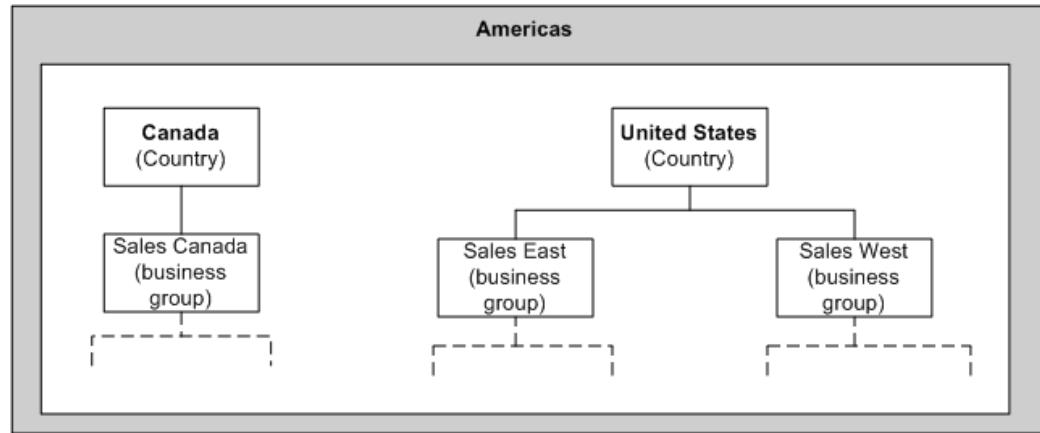
Each of the business groups in the Americas region has a plan administrator. To restrict the plan administrator's access to the appropriate business group, you must set up correct security profiles. You can also enable a super user access to all the business groups in the Americas region, so that the super user can administer plans across business groups.

The following diagram shows the organization hierarchies of the two business groups: Eastern Sales and Western Sales.

Organization Hierarchy
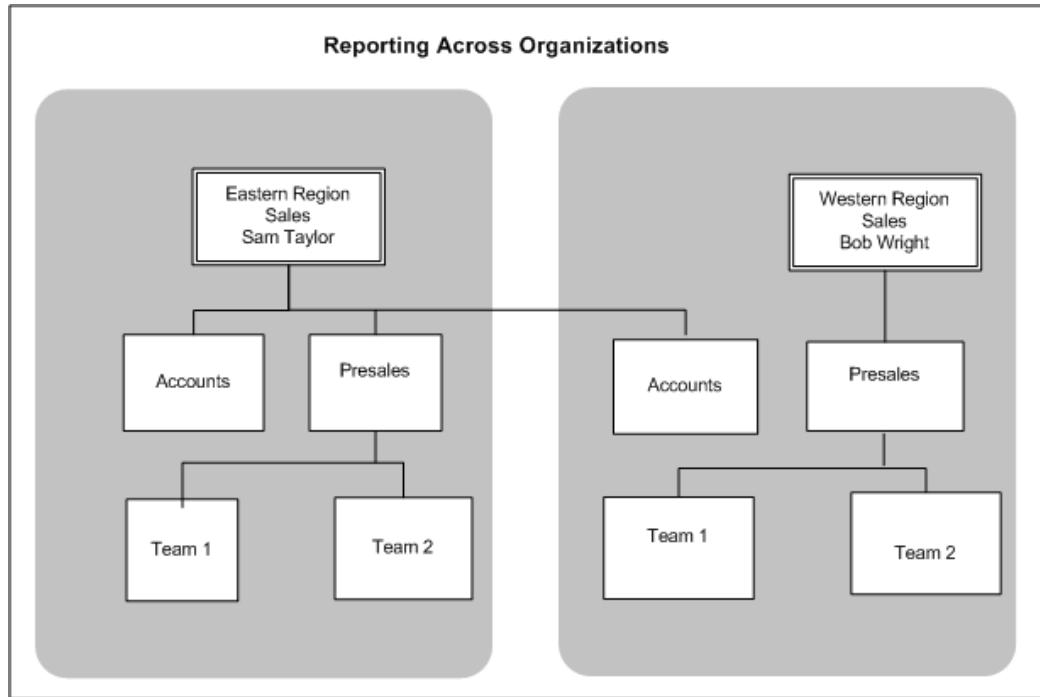
In this diagram, Sam Taylor manages the Accounts and Presales departments in the Eastern region and the Accounts department in the Western region. Based on the supervisor hierarchy setup, all workers in the Accounts and Presales departments in the Eastern region and the Accounts department in the Western region report to Sam Taylor. Workers in the Presales department and its subordinate teams report to Bob Wright.

Henry Wilson, a super user has access to Eastern Sales and Western Sales business groups and can view data of both the groups.

In the following example, let us look at how a plan population is identified when a plan is published.

Performance Management Plan without the Eligibility Criteria

The requirement is to assess the performance of all workers in Sam's hierarchy. To meet this requirement, Henry Wilson has to create a performance management plan for the Eastern Sales region.

This example assumes that the following components are available:

• Questionnaires

• Objectives

• Objective templates

- Competency templates

- Appraisal templates

> **Note:** In this example, Henry does not use the eligibility profile criteria.

Henry follows these steps to create the PMP for East plan that includes objective setting and appraisals.

1. Logs in to the HR Professional V4.0 responsibility.

2. Selects the Performance Management link. The Performance Management home page appears.

3. Clicks the Performance Management Plans link in the Administration region and then Create Plan.

4. Enters the following information in the Create Plan: General Information page:

    1. Name of the plan.

    2. Start and end dates.

    3. Selects Henry Wilson as the plan administrator.

    4. Clicks Next.

5. Enters the following information in the Create Plan: Population page:

    1. Selects Supervisor as the hierarchy type.

    2. Selects Sam Taylor as the Supervisor. When you create a plan, you must select the manager as the supervisor so that the manager is part of the plan population. Otherwise, the plan is not published to the manager and the manager cannot access scorecards or appraisals of workers reporting to them.

    3. Leaves the Hierarchy Levels field blank to select all levels in Sam's hierarchy.

    4. Selects Both as the assignment type to include employees and contingent workers.

    5. Selects the Primary Assignments Only check box.

    6. Leaves the Eligibility Profile Name blank.

6. Enters the following information in the Create Plan: Process page:

1. Selects the Include Objective Setting in Process check box and provides the start and end dates for objective setting.

2. Selects Cascading as the method.

3. Selects the Notify Plan Population check box.

4. Selects the Automatic Allocation check box.

5. In the Appraisals region:

   • Selects the Include Appraisals in Process check box and appraisal template.

   • Enters the appraisal start and end dates, appraisal task start and end dates.

   • Leaves the Eligibility Profile field blank in the Appraisals region.

   • Selects main appraiser as the initiator, Standard Appraisal as the appraisal type, and Performance Appraisal as the appraisal purpose.

   • Selects Yes to create appraisals.

When the plan publish process completes successfully, the plan is published to all the workers in Sam's hierarchy. Sam must first set his objectives to initiate the performance management plan process.

Performance Management Plan with the Eligibility Criteria

In this example, the requirement is to assess the performance of directors who report to Sam Taylor. The plan must be published to directors only. Sam has directors in both the Eastern and Western sales region business groups.

Using the Participation Eligibility Profiles window, Henry defines the following participant eligibility profile:

Field	Value
Name	Director Eligibility
Assignment Type	Employee Assignment
Status	Active
Applies To	Benefits Profile

Field	Value
Position	Director - Sales
	Vice President - Eastern Region

To ensure that the plan is published to Sam Taylor so that he can access scorecards and appraisals of his directors, Henry associates Sam Taylor's position, which is Vice President - Eastern Region with the eligibility profile.

> **Note:** When you define an eligibility profile to use in a performance management plan, you must ensure that the topmost supervisor in the plan population is a part of the plan population. Otherwise, the topmost supervisor cannot access scorecards or appraisals of workers reporting to them directly.

After defining the eligibility profile, Henry creates a plan: PMP for Directors. When he creates this plan, he selects the Directory Eligibility profile in the Eligibility Profile Name field in the Create Plan: Population page. When Henry publishes the plan, the application generates personal scorecards for Sam Taylor and workers who hold the Director-Sales position.

Note that Henry does not select any profile in the Eligibility Profile field in the Appraisals region as the purpose of the eligibility profile is to roll out the plan to sales directors only. You can use this field to roll out different appraisal templates to different sets of the plan population.

Plan Tasks that Managers can Perform

If managers have to set their own objectives using the Employee Self-Service responsibility, then they must be part of the performance management plan population.

Managers who are not eligible for a plan and hence are not a part of the plan population can view the plan tasks displayed on their Performance Management home page. Using the Manager Self-Service responsibility, managers can navigate to their Performance Management home page to set objectives for their subordinate workers, *if subordinate workers are eligible for the plan*. Managers can set objectives, initiate, and update appraisals of their subordinate workers.

Profile Options in Oracle Performance Management

A user profile is a set of changeable options that affects the way your application runs. You can set user profiles at different levels. The levels below are used by the standard security hierarchy type:

- Site level: These settings apply to all users at an installation site.

- Application level: These settings apply to all users of any responsibility associated with the application.

- Responsibility level: These settings apply to all users currently signed on under the responsibility.

- User level: These settings apply to individual users, identified by their application usernames.

Values set at a higher level cascade as defaults to the lower levels. Values set at a lower level override any default from a higher level.

You use the System Profile Values window to set profile options at each level. If you change a user profile option value, your change takes effect as soon as your users log on again or change responsibilities.

Profile Options Summary

The following table lists the profile options that you can define for Oracle Performance Management and the levels at which the profile options can be set.

Profile Options

Profile	Configurable Level	Values (default value in boldface)	Value Required?
HR: Appraisee Can Add Participants	All	**Yes**, No	No
HR: Worker Appraisals Menu	Site	**Employee Appraisals Menu**	Yes
HR: Manager Appraisals Menu	Site	**Manager Appraisals Menu**	Yes
HR: Apply Assessment Competencies to Person	Site	Yes, **No**	No
HR: Performance Management Source Type	Site	[PROFICIENCY_SOURCE lookup value]	No

Profile	Configurable Level	Values (default value in boldface)	Value Required?
HR: Save and Stay in Appraisals Page	User, Site	**Yes**, No	No
HR: Allow Updates to Objective Details Added by Appraisee	All	**Yes**, No	No
HR: Display Completed Appraisal from Other Business Groups	All	Yes, No	No
HR: Update PMP Appraisals After the Appraisal Period	Responsibility, User	Yes, No	No
HR: View Historical Plans (YYYY/MM/DD)	Site, Application, Responsibility, User	-	No
HR: Enable Star Rating For Performance and Proficiency Levels in Competencies	Site, Application, Responsibility, User	Yes, No, **Null** (Null value or blank is considered as No)	No

Profile Options Description

- *HR: Appraisee Can Add Participants*

  Controls whether appraisees can add participants to their appraisals. If you set this profile option to Yes (the default value), appraisees can add participants. If you set this profile option to No, appraisees cannot add participants.

  > **Note:** You can set the HR: Appraisee Can Add Participants option to No and when you configure the appraisal template, you can select Add Participant in the Appraisee Permissions region of the appraisal template, which sets this feature at the template level.

- *HR: Worker Appraisals Menu*

  Controls the types of appraisal a worker can create. By default, this option is set to

Employee Appraisals Menu.

- *HR: Manager Appraisals Menu*

  Controls the types of appraisal a manager can create. By default, this option is set to Manager Appraisals Menu.

- *HR: Apply Assessment Competencies to Person*

  Controls whether the application updates an appraisee's competency profile automatically when an appraisal is complete. By default, this option is set to No. If set to Yes, automatically updates the appraisee's competency profile with data from a completed appraisal.

  > **Note:** Apply Assessment Competencies to Person applies at the site level. As an alternative, when you configure the appraisal template, you can select Update Competency Profile in the appraisal template, which sets this feature at template level.

- *HR: Performance Management Source Type*

  Enables you to select a default value from the PROFICIENCY_SOURCE (Source of Proficiency Rating) user lookup. The application uses this value when updating a person's competency profile automatically.

- *HR: Save and Stay in Appraisals Page*

  Controls what happens when the user clicks Save as Draft in an Appraisals page. When this option is set to Yes, which is the default value, the user remains in the current page and can continue to edit the appraisal. When this option is set to No, the Appraisals home page appears.

- *HR: Allow Updates to Objective Details Added by Appraisee*

  Controls whether managers can update objectives and objectives' details added by workers. If you set the profile option to Yes, then managers can update the objectives and objectives' details added by workers. You can set the profile option to No, if you do not want managers to update the objectives and objectives' details added by workers. If you do not set a value for the profile option or leave the profile option blank, then managers can update the objectives and objectives' details added by employees.

- *HR : Round Off Decimals in Total Competency and Objective Scores*

  Limits the number of decimal places in total competency and objective scores. Instead of a long string of decimal places, the application can approximate the value of the decimal to a specified decimal place. To round off decimals, set this profile option. For example, if the profile option is set to a value of 3, then the application rounds off the scores to that specific decimal place. The default value is 4.

- *HR: Display Completed Appraisal from Other Business Groups*

  Controls the display of completed appraisals of workers who are terminated from one business group and rehired into another business group.

  Typically, in an enterprise, employees or contingent workers transfer from one business group to another business group. They can also be terminated from one business group and rehired in another business group. In such cases, managers or HR Professionals may want to view the previously completed appraisals of workers from the earlier business group. Set the profile option value to Yes to enable managers or HR Professionals to view completed appraisals from other business groups.

- *HR: Update PMP Appraisals After the Appraisal Period*

  Controls whether managers and workers can complete performance management plan (PMP) appraisals after the Appraisal Task End Date and before the Plan Period End Date.

  In any enterprise, there may be workers who do not complete their performance management plan appraisals within the appraisal period due to reasons such as being on leave. Set the profile option to Yes to enable managers and workers to update PMP appraisals after the Appraisal Task End Date. If the profile option is set to No or is left blank, then managers and workers cannot update PMP appraisals after the Appraisal Task End Date. There is no default value for this profile option.

  > **Important:** This profile option applies to performance management plan appraisals only.

- *HR: View Historical Plans (YYYY/MM/DD)*

  Controls the display of performance management plans based on the date entered as the profile value. Enter the effective date from when you want to display historical plans. For example, if you enter 2005/01/01 as the profile option value, then the application displays plans with the start date on or after 2005/01/01.

- *HR: Enable Star Rating For Performance and Proficiency Levels in Competencies*

  Enables managers and workers to use star rating levels instead of the conventional drop-down list of rating scale values to rate performance and proficiency levels in competencies. This profile option can be set at the Site, Application, Responsibility, and User levels.

  You can select either Yes or No. If you leave the profile option value blank or null, then the application considers it as No.

  If this profile option is set to Yes at any of the levels, then the application displays the star rating component in the following functions:

  - In the Competency Profile function, the star rating component is displayed on

the following pages and tables:

Current Competencies

Correct Competencies

Enter New Levels

Proposed Changes table

Competency History

Add Competencies page

Competency Profile: Review

Competencies Awaiting Approval

- In Appraisals (both appraisals created using the Appraisals function and performance-management plan appraisals), the star rating component will be displayed only for the proficiency and performance rating scale in the Competencies region.

> **Note:** The 'Current Proficiency Level' in the Competency Profile function alone supports the star rating component. In the Appraisals function the 'Current Proficiency Level' does not support the star rating component.

- In the All Actions Awaiting Your Attention function, the star rating component is displayed for approvers, when a Competency Profile transaction is submitted for approval.

For information on profile options in Oracle HRMS, see: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Configuring Appraisals and Questionnaire Administration

Configuring the Appraisals Function

The Appraisals function, accessed using the Employee and Manager responsibilities, manages the structure, content, and distribution of the worker appraisal process. Before creating an appraisal, users must create at least one appraisal template.

Configuring the Appraisal

You can perform most standard configurations of the appraisal in the appraisal template. For example, to include a Competencies section in the appraisal, you create a competency assessment template and include it in the appraisal template. Otherwise, the appraisal contains no Competencies section.

Organizations that run Oracle Learning Management (formerly Oracle Training Administration) may want to include the Learning Path region in appraisals.

To include the Learning Path region, you can:

1. Personalize the following pages, enabling both to display the item TraActivitiesRN:

   • Overview page: mds/selfservice/appraisals/webui/OverviewPG.xml

   • Main Appraiser Final Ratings page: mds/selfservice/appraisals/webui/MAFinalRatingsPG.xml

2. Using the page layout tree in the personalization page for the pages listed in Step 1, personalize the region TraActivitiesRN to enable the item Training Courses and remove the item View Competency Gaps.

3. Personalize relevant pages to show the Learning Path review region.

For standard and 360-degree appraisals, the Add Courses Based on Competency Gaps button can appear only on the main appraiser Give Final Ratings page.

To personalize the Give Final Ratings page:

1. Click Save as Draft to save the appraisal.

2. Click Next, then Click Apply.

3. Click Give Final Ratings.

4. In the Final Ratings page, select Personalize Page.

5. Set Rendered to True for the following items:

- Default Single Column: (TrainingActRN)

- Submit Button: Add Courses Based on Competency Gaps

- Header: Learning Path

If you use the Manage Appraisal Templates function to create appraisal templates, you can select Include Learning Path to include this region.

Changing the Initial Values of the Appraisal Sharing Options

When the main appraiser shares the appraisal with the appraisee, the main appraiser specifies which information the appraisee can view and whether the appraisee can update the appraisal. For example, to share competency ratings and comments, the main appraiser selects the Competency Ratings and Comments check box. By default, all options on the Share Appraisal Details with Appraisee page (except Main Appraiser Retains Ownership) are selected.

To change the initial selection setting of any of the sharing options, you personalize the Appraisal Setup Details page. To personalize any attribute other than the initial setting, you personalize the Share Appraisal Details with Appraisee page. For example, to remove the Participant Details checkbox, you personalize the Share Appraisal Details with Appraisee page. To make Participant Details deselected by default, you personalize the Appraisal Setup Details page.

> **Note:** Within a single appraisal, the application sets the default values once only, when you first access the Appraisal Setup Details page. If you change the default values while an appraisal is in progress, those changes are not apparent in the existing appraisal. The changes become apparent only when you start a new appraisal.

To change the initial values of the sharing options, you select Personalize Page from the Appraisal Setup Details page. Alternatively, you can use the Functional Administrator responsibility, select the Personalization tab, and enter the document path: /oracle/apps/per/selfservice/appraisals/webui/SetupDetailsPG. This approach enables you to change initial values without launching the appraisals process flow.

> **Note:** If you use the Manage Appraisal Templates function, you can configure these sharing options interactively for each appraisal template.

Identifying a Default Appraisal Template

To identify a default appraisal template for an appraisal type (for example, for a

standard appraisal), you select Personalize Page from the Appraisal Setup Details page. You personalize the field Message Text Input: (ApprTemplateIdTxtInp) and enter the numeric identifier of the appraisal template.

Menu and Function Names

The following table describes the menu and function names.

Menu and Function Names

User Menu Name	Function Name
Employee Self-Service	Appraisals (HR_EMP_MY_APPR_SS)
Employee Self-Service	Performance Management (HR_EMP_TALMGMT_HMPAGE_SS)
Contingent Worker Self-Service	Appraisals (HR_EMP_MY_APPR_SS)
Contingent Worker Self-Service	Performance Management (HR_EMP_TALMGMT_HMPAGE_SS)
Manager Self-Service	Appraisals (HR_MGR_MN_APPR_SS)
Manager Self-Service	Performance Management (HR_MGR_TALMGMT_HMPAGE_SS)
HR Professional	View Appraisals Manager - HR Sys Admin (HR_VIEW_SYSAPPR_MGR_SS)

Profile Options

Define the following profile options that affect the Appraisals function:

- HR: Appraisee Can Add Participants

- HR: Worker Appraisals Menu

- HR: Manager Appraisals Menu

- Apply Assessment Competencies to Person

- Performance Management Source Type

- HR: Save and Stay in Appraisals Page

- HR: Allow Updates to Objective Details Added by Appraisee

- HR :Round Off Decimals in Total Competency and Objective

- HR: Display Completed Appraisal from Other Business Groups

- HR: Update PMP Appraisals After the Appraisal Period

For information on these profile options, see: Profile Options in Oracle Performance Management, page 1-22

Workflow

Workflow Process Display Name: Appraisal Details Process

Workflow triggers multiple events, usually notifications to participants. Completion of a standard or 360-Degree appraisal automatically updates the appraisee's competency profile (unless the system profile is disabled), creates or updates the appraisee's learning path, and creates a Performance Review event, which in turn can transfer the overall rating and other data to other modules such as Compensation Workbench.

If you define or configure new functions, you can enable or disable approvals by adding one of the following values to the parameter "pApprovalReqd":

- Y [approvals required]

- YD [approvals with Dynamic Approval support]

- N [no approvals required]

YD is the default value. You cannot enable approvals for self appraisals.

The table below lists the workflow notifications that are specific to appraisals.

Workflow Notifications

Message Source	Message Name	Subject	Body
SYSADMIN	HR_APPRAISAL_COMMAPPLERR_MSG	An application error has occurred in your process &PROCESS_DISPLAY_NAME performed on &CURRENT_PERSON_DISPLAY_NAME	Your &PROCESS_DISPLAY_NAME performed on &CURRENT_PERSON_DISPLAY_NAME has encountered the following application error: &ERROR_MESSAGE_TEXT Please click the link below to view the changes. The HR Rep/System Administrator has been notified. For further action on this failed transaction, please contact your HR Rep/System Administrator &APPROVAL_HISTORY
SYSADMIN	HR_APPRAISAL_COMMIT_APPERR_MSG	An application error has occurred in your &PROCESS_DISPLAY_NAME process	Your process &PROCESS_DISPLAY_NAME has encountered the following application error: &ERROR_MESSAGE_TEXT This process has been cancelled without any changes being made. After correcting the issue, click Retry to complete the transaction.
Main Appraiser User Name	HR_APPRAISAL_OTHER_PARTIC_MSG	The appraisal of &REVIEWEE needs your attention as other participant	&FORWARDER has requested that you participate in the appraisal (dated &APPRAISAL_DATE) of &REVIEWEE Comments: &WF_NOTE Please click &OBJECT_URL to view the details.

Message Source	Message Name	Subject	Body
Main Appraiser User Name	HR_APPRAISAL_REVIEWER_MSG	The appraisal of &REVIEWEE needs your attention as reviewer	&FORWARDER has requested that you review the appriaisal (dated &APPRAISAL_DATE) of &REVIEWEE Comments: &WF_NOTE Please click &OBJECT_URL to view the details.
Main Appraiser User Name	HR_APPRAISER_MSG	The appraisal of &REVIEWEE needs your attention as appraiser	&FORWARDER has requested that you act as appraiser for the appraisal (dated &APPRAISAL_DATE) of &REVIEWEE Comments: &WF_NOTE Please click &OBJECT_URL to view the details.
Main Appraiser User Name	HR_APPRAISAL_COM_APPRAISEE_MSG	Your appraisal has been completed	&FORWARDER has completed your appraisal. Please click &OBJECT_URL to view the appraisal details.
Main Appraiser User Name	HR_TRANSFER_TO_APPRAISEE_MSG	Your appraisal has been transferred to you	&FORWARDER has requested that you modify the details of your appraisal dated &APPRAISAL_DATE Comments : &WF_NOTE Please click &OBJECT_URL to view the appraisal details.
Main Appraiser User Name	HR_EMBED_SHARE_LATEST_MSG	View latest details of your appraisal	Links to appraisal details

Message Source	Message Name	Subject	Body
SYSADMIN	HR_NTFY_MA_COMPLETE_MSG	&PROCESS_DISPLAY_NAME for &CURRENT_PERSON_DISPLAY_NAME has been approved	Final Approver: &FORWARD_TO_DISPLAY_NAME User Name: &FORWARD_TO_USERNAME Comment: &APPROVAL_COMMENT &PROCESS_DISPLAY_NAME changes for &CURRENT_PERSON_DISPLAY_NAME have been approved and completed. View the status below, and verify the successful completion of the appraisal. This notification requires no action.
Main Appraiser User Name	HR_MAIN_APPRAISER_MSG	The appraisal of &REVIEWEE needs your attention as main appraiser	The appraisal (dated &APPRAISAL_DATE) of &REVIEWEE requires your attention as the main appraiser. Comments : &WF_NOTE Please click &OBJECT_URL to view the details.
Main Appraiser User Name	HR_PART_TO_MAIN_APPRAISER_MSG	&FORWARDER has completed their appraisal of &REVIEWEE	&FORWARDER has completed their appraisal (dated &APPRAISAL_DATE) of &REVIEWEE Comments : &WF_NOTE Please click &OBJECT_URL to view the details.

Message Source	Message Name	Subject	Body
Main Appraiser User Name	HR_NEW_M AIN_APPRAI SER_MSG	You have been selected as main appraiser for the appraisal of &REVIEWEE	&FORWARDER has requested that you take over for &MAIN_APPRAISER as the main appraiser in the appraisal (dated &APPRAISAL_DATE) of &REVIEWEE Comments : &WF_NOTE Please click &OBJECT_URL to view the details.
SYSTEM	HR_NTFY_M A_PENDAPP R_MSG	&PROCESS_DISPLAY_NA ME for &CURRENT_PERSON_DIS PLAY_NAME has been approved and is pending appraisee feedback	Final Approver: &FORWARD_TO_DISPLA Y_NAME User Name: &FORWARD_TO_USERN AME Comment: &APPROVAL_COMMENT &PROCESS_DISPLAY_NA ME changes for &CURRENT_PERSON_DIS PLAY_NAME have been approved. The appraisal requires appraisee feedback. View the status below, and verify the successful completion of the appraisal &HR_APPRAISAL_COMM IT_LOG This notification required no action.
Participant	HR_EMBED_ PART_TO_M A_MSG	Appraisee &CURRENT_PERSON_DIS PLAY_NAME has provided feedback on &PROCESS_DISPLAY_NA ME	&CURRENT_PERSON_DIS PLAY_NAME has provided feedback on &PROCESS_DISPLAY_NA ME This notification requires no action.
SYSTEM	HR_EMBED_ APPRAISEE_ FBCK_MSG	Your appraisal has been completed. Please review and provide feedback.	

Configuring Text

You can configure most text (including tips, instructions, and messages) on the Appraisals pages using the Personalize Page function.

Editing Page Titles

To change an Appraisals page title, you edit both the title message and either the Employee Appraisals menu or the Manager Appraisals menu.

To change the title message, you log in to HRMS using the Application Developer responsibility and navigate to the Messages window.

The title messages you can edit for the Create Appraisal pages are:

Appraisals Page	Message	Default Message Text
Setup Details	HR_INST_APPR_CREATE_SETUP_SS	Create &1: Setup Details
Overview	HR_INST_APPR_CREATE_OVIEW_SS	Create &1: Overview
Review	HR_INST_APPR_CREATE_REVIEW_SS	Create &1: Review

The title messages you can edit for the Update Appraisal pages are:

Appraisals Page	Message	Default Message Text
Setup Details	HR_INST_APPR_UPDATE_SETUP_SS	Update &1: Setup Details
Overview	HR_INST_APPR_UPDATE_OVIEW_SS	Update &1: Overview
Review	HR_INST_APPR_UPDATE_REVIEW_SS	Update &1: Review

The "&1" value in the default message text resolves to the appraisal type value (for example, "Standard Appraisal") from the Employee Appraisals menu or the Manager Appraisals menu, as appropriate. The menus and their default prompts are as follows:

User Menu Name	Menu	Default Prompts
Employee Appraisals	HR_EMPLOYEE_APPRAISALS_MENU	Self Appraisal
		Standard Appraisal
		360-Degree Appraisal
Manager Appraisals	HR_MANAGER_APPRAISALS_MENU	Standard Appraisal
		360-Degree Appraisal

To change the appraisal type value, navigate to the Menus window and modify the prompt in the relevant menu.

For example, to change the page title "Update Standard Appraisal: Setup Details" to "Modify Annual Appraisal Setup Information" for an employee, you:

- Change the message "Update &1: Setup Details" to "Modify &1 Setup Information".

- Change the prompt "Standard Appraisal" in HR_EMPLOYEE_APPRAISALS_MENU to "Annual Appraisal".

Configurable Flexfields

If the FND: Diagnostic profile option is enabled, you can click About this Page on any appraisal page to display a list of the flexfields on the page.

Viewing and Updating Appraisals of Ex-Employees and Ex-Contingent Workers

Managers and HR Professionals can view and update appraisals of terminated workers.

To enable ex-employee and ex-contingent worker support in the search, you change the value of the *pEnableTerms* parameter value to Y for the Appraisals functions.

Setting the parameter for the HR Professionals Function

To enable HR Professionals to view and update appraisals of terminated workers, set the pEnableTerms parameter to Y for the function: View Appraisals Manager - HR Sys Admin (HR_VIEW_SYSAPPR_MGR_SS).

> **Note:** If you are using a custom version of the HR_VIEW_SYSAPPR_MGR_SS function, you must set the *pIsHRProf* parameter to Y.

The following table explains how HR Professionals can view and update appraisals of terminated workers:

Task	Performance-Management Plan Appraisals	Appraisals created using the Appraisals Function
View appraisals	Use the Switch as Manager function.	Use Advanced Search available in the Appraisals: People page from the Appraisals function.
Update appraisals	Use the Update Appraisals of Terminated Workers option available in the Performance Management Plan Administration Tasks page. See: Performance-Management Plan Administration Tasks, page 1-149	Use Advanced Search available in the Appraisals: People page from the Appraisals function.

> **Note:** As HR Professionals are super users, they can update appraisals if the parameter value is set to Yes. The appraisal template permissions that apply to main appraisers do not apply to HR Professionals. See: Update Appraisals - Main Appraiser, page 1-39

Setting the parameter for the Manager functions

By default, the pEnableTerms parameter is set to Y for these functions:

- Manager: Main Appraiser Page (HR_MGR_MN_APPR_SS)

- Manager: Performance Management Page (HR_MGR_TALMGMT_SS)

- View Appraisals Manager (HR_VIEW_APPRAISALS_MGR_SS)

  Setting the parameter for this function enables managers to view appraisals of terminated workers in their hierarchy using the View Appraisals in People Hierarchy button.

The following table explains how managers can view and update appraisals of terminated workers:

Task	Performance-Management Plan Appraisals	Appraisals created using the Appraisals Function
View appraisals	For direct reports, view appraisals in the Performance Management Plan Appraisals In Progress table of the Appraisals as Main Appraiser page. To view appraisals of indirect reports use the View Appraisals page. This page appears when you click the View Appraisals in People Hierarchy button.	For direct reports, view appraisals in the Appraisals In Progress table of the Appraisals As Main Appraiser page. To view the appraisals of indirect reports use the View Appraisals page. This page appears when you click the View Appraisals in People Hierarchy button.
Update appraisals **Note:** To enable main appraisers to update appraisals of terminated workers , in addition to setting the pEnableTerms parameter to Y for the manager functions, the appropriate options in the appraisal template must be configured. For more information on enabling main appraisers to update appraisals of terminated workers, see: The Appraisal Template, page 1-189	For direct reports, update appraisals from the Performance Management Plan Appraisals In Progress table of the Appraisals as Main Appraiser page. For indirect reports, use the Switch as Manager feature to update appraisals.	For direct reports, update appraisals from the Appraisals In Progress table of the Appraisals As Main Appraiser page. To update the appraisals of indirect reports use the View Appraisals page. This page appears when you click the View Appraisals in People Hierarchy button.

Displaying the Terminated Workers Tab

On the Appraisals as Main Appraiser page (MgrMainAppraiserPG), you can display the Terminated Workers tab using the Personalization function. This tabbed region, which shows completed appraisals of ex-employees and ex-contingent workers is hidden by default.

Downloading and Uploading Appraisals

Using the Download and Upload Appraisals functionality, main appraisers, appraisees,

and other participants can complete certain sections of the appraisal offline.

See: Downloading and Uploading Appraisals, page 1-170

If your enterprise does not use the Downloading and Uploading Appraisals functionality, then you can hide this feature for managers, employees, and participants, using the Personalization function. Complete the following steps:

- On the Appraisals home page, hide the Download button in the Appraisals In-Progress and Performance Management Plan Appraisals In Progress regions.

- In the Appraisals In-Progress and Performance Management Plan Appraisals In Progress tables, hide the following columns related to the Downloading and Uploading Appraisals functionality:

  - Download

  - Select a File

  - Upload

  Ensure that you hide the Downloading and Uploading Appraisals functionality on the following pages:

  - My Appraisals (Employee Self-Service responsibility): /oracle/apps/per/selfservice/appraisals/webui/EmpMyAppraisalsPG

  - Appraisals As Participant: /oracle/apps/per/selfservice/appraisals/webui/EmpParticipantPG

  - Appraisals as Main Appraiser (Manager Self-Service responsibility)

  - Appraisals As Participant: /oracle/apps/per/selfservice/appraisals/webui/MgrParticipantPG

Configuring the Publish to Catalog Feature

When managers or workers create or update objectives or give final appraisal ratings, they can add attachments and make the attachments available globally in Oracle E-Business Suite of applications using the Publish to Catalog feature.

Attachments published to catalog are available to other users if:

- The Attachments feature is enabled on Oracle Applications pages.

- The Search from Catalog option is enabled on the Oracle Applications pages.

If you do not want managers or workers to use the Publish to Catalog feature for attachments, then you can hide the Publish to Catalog column on the following pages using Personalization:

- Create Objectives

- Update Objectives

- Give Final Ratings: Review

You must personalize the following pages in Employee and Manager Self Service responsibilities:

- oracle/apps/per/selfservice/appraisals/webui/ObjDetailsPG

- /oracle/apps/per/selfservice/appraisals/webui/ObjUpdatePG

- /oracle/apps/per/selfservice/appraisals/webui/MAObjDetailsPG

- /oracle/apps/per/selfservice/appraisals/webui/MAObjUpdatePG

- /oracle/apps/per/selfservice/appraisals/webui/ObjRatingDetPG

To render off the Publish to Catalog column, navigate to the respective personalization page and click the Personalize link for Attachment Table: Objective Attachments. In the Personalization Properties page, set the Enable Document Catalog property to False at the required personalization level.

See: *Publish to catalog option in Appraisals* on My Oracle Support Note ID:730074.1

Displaying the Save Attachments Check box on the Give Final Ratings: Review Page

When main appraisers give final ratings, they can select the Save Attachments check box to save attachments to the self-service transaction and view them in the Oracle HRMS People window. The Save Attachments check box on the Give Final Ratings: Review page is hidden by default. Enterprises can decide whether to display the check box on the Give Final Ratings: Review page using the Personalization feature.

Personalizing Pop-up windows on the Performance Management Pages

To personalize the contents in the popup windows, set the FND: Personalization Region Link Enabled profile option to Yes

Personalizing the Latest Appraisal Information Pop-up Window

On the Appraisals: People in Hierarchy page, when a manager places the mouse over the Details icon, the Latest Appraisal Information pop-up window appears. By default, this window displays the following fields for an appraisal:

- Main Appraiser

- Appraisal Date

- Appraisal Status

- Overall Rating

If required, you can display the following fields on the pop-up window that are hidden by default:

- Initiator

- Period Start and End Dates

- Readiness Level

- Retention Potential

Personalizing the Quick Update Pop-up Window on the Update Appraisal Page

When creating or updating appraisals, managers and workers can make quick updates to objectives using the pop-up window that appears when they click the Quick Update icon. The Quick Update icon column is available on the following pages, by default:

- Create Appraisal: OverviewPG

- Update Appraisal (MAAppraisePG)

You can hide the Quick Update column using personalization, if required.

Displaying the Print or Print All Column in the Main Appraiser and My Appraisals Pages

The Appraisals In Progress and Complete Appraisals tables in the Main Appraiser (MgrMainAppraiserPG) and My Appraisals (EmpMyAppraisalsPG) pages display the Print column, by default. When users click the Print icon, the Configure Print Options for Printable Page appears where the user can select either form or table layout and the required appraisal sections to print. See: Printing Appraisals, page 1-172

The application provides a Print All column in both the tables and the column is hidden by default. The Print All column allows managers and workers to print the entire appraisal based on the permissions defined in the appraisal template. This column, which is hidden by default must be displayed, if required, using the Oracle Framework Personalization feature. If the Print All column is displayed, then the Print column that provides the configurable print options must be hidden.

As an example, the following steps explain how to display the Print All column and hide the Print column in the Main Appraiser (MgrMainAppraiserPG) page:

Personalization in the Appraisals In Progress Table

To display the Print All column:

1. Set the Personalize Self–Service Defn and Disable Self–Service Personal personalization options to Yes.

2. Navigate to the Manager Self-Service responsibility.

3. Navigate to the Main Appraiser (MgrMainAppraiserPG) page.

4. Click the Personalize "Appraisals In Progress" link in the Appraisals In Progress section. The Personalize Region: Appraisals In Progress page appears.

5. Click Complete View and Expand All in the Personalization Structure section.

6. Navigate to the Image: Print All row.

7. Click the Personalize pencil icon. The Personalize Image : Print All page appears.

8. Scroll to the Rendered row. The default value is false.

9. Select True at the required level.

10. Click Apply.

11. Click Return to Application.

To hide the Print column:

1. Navigate to the Personalize Region: Appraisals In Progress page.

2. Click the Personalize icon in the Image: Print row. The Personalize Image : Print appears.

3. Scroll to the Rendered row. The default value is true.

4. Select false at the required level.

5. Click Apply.

6. Click Return to Application.

Personalization in the Completed Appraisals Table

To display the Print All column:

1. Navigate to the Main Appraiser (MgrMainAppraiserPG) page.

2. Click the Personalize "Personalize Appraisal Results" link in the Completed Appraisals section. The Personalize Region: Appraisal Results page appears.

3. Click Complete View and Expand All in the Personalization Structure section.

4. Navigate to the Image: Print All row.

5. Click the Personalize pencil icon. The Personalize Image : Print All page appears.

6. Scroll to the Rendered row. The default value is false.

7. Select True at the required level.

8. Click Apply.

9. Click Return to Application.

To hide the Print column:

1. Navigate to the Personalize Region: Appraisal Results page.

2. Click the Personalize icon in the Image: Print row. The Personalize Image : Print appears.

3. Scroll to the Rendered row. The default value is true.

4. Select false at the required level.

5. Click Apply.

6. Click Return to Application.

Perform similar steps to display the Print All column and hide the Print column in the My Appraisals (EmpMyAppraisalsPG) page.

Configure the Printable Template, if Required

Using the Configure Print Options for Printable page managers and workers can print appraisals in the Adobe Acrobat PDF format. They have the flexibility to select the required print layout and the appraisal sections that they want to print. See: Printing Appraisals, page 1-172

Oracle Performance Management provides a predefined 'Appraisal Printable Template', which is an Oracle XML Publisher RTF template to print appraisals in the PDF format. Enterprises can use the predefined template or create their own RTF template to meet their business requirements.

The following steps explain how to create and use a custom template:

1. Create a copy of the predefined 'Appraisal Printable Template'.

2. Make the required changes in the custom RTF template.

3. Name the custom RTF template in the 'PERAPPRCUSTPRINT_Appraisal_Template_ID' (Appraisal_ID is a number) format, so that the application identifies and uses the custom RTF template instead of the predefined RTF template.

4. Deploy the custom template using the XML Publisher Administrator responsibility.

For information how to create XML Publisher templates and deploy them, refer to the *Oracle XML Publisher Administration and Developer's Guide* and *Oracle XML Publisher Report Designer's Guide*.

Note for Customers who use the Questionnaire HTML Model (HR_QUEST_ADMIN_SS) and the Configurable Print Functionality

Using the Configure Print Options for Printable Page, if managers or workers try to print an appraisal that includes a questionnaire based on the Questionnaire HTML model (HR_QUEST_ADMIN_SS), only the answers get printed correctly in the PDF report.

In place of questions, the report displays the following placeholder content for questions:

For example:

- Appraisee questionnaire section displays:

  First Question for appraisee goes here

  Second Question for appraisee goes here

- Main Appraiser questionnaire section displays:

  First Question for main appraiser goes here

  Second Question for main appraiser goes here

If you are using the HTML based questionnaire model and the Configurable Print functionality to print PDF of appraisals, then to ensure that the application retrieves questions from the database for the Print PDF report, you must manually enter questions in the print RTF template (predefined or custom).

Steps to manually enter questions in the print RTF template:

1. Download the print RTF template that is used to print appraisals.

2. Open the RTF template.

3. Navigate to the Questionnaire section. You can view the placeholder content for questions.

4. Replace the placeholder content for questions with the actual questions. For information on how to modify templates refer to: Oracle XML Publisher Administration and Developer's Guide and Oracle XML Publisher Report Designer's Guide.

5. Save your work.

6. Deploy the template using the XML Publisher Administrator responsibility.

Questionnaires based on the Questionnaire Administration (HR_QUEST_ADMIN_NEW_SS) can be printed using the Configurable Print feature without making any changes to the print RTF template, unless there is a requirement to customize the template.

Configuring Questionnaire Administration

This topic provides details about the Questionnaire Administration module.

Menu and Function Names

You can access the Questionnaire Administration module from the menus and functions in the table below.

Menu and Function Names

User Menu Name	Function Name
HR Professional	Questionnaire Administration (HR_QUEST_ADMIN_SS)
Questionnaire Functions Menu	HR_QUEST_ADMIN_SS (Questionnaire Administration) HR_QUEST_DEFINE_SS (Create Questionnaire)HR_QUEST_PREVIEW_SS (Preview Questionnaire)HR_QUEST_VIEW_SS (Preview Questionnaire)HR_QUEST_UPD_PREVIEW_SS (Preview Questionnaire)HR_QUEST_UPDATE_SS (Update Questionnaire)

Note: Questionnaire Functions Menu is a submenu of Questionnaire Administration. To include the Questionnaire Administration function in a custom menu, include HR_QUEST_ADMIN_SS with a prompt and Questionnaire Functions Menu as a submenu without a prompt. Do not include prompts for the functions in the submenu.

Workflow

Questionnaire Administration uses no configurable workflow processes.

Tips, Instructions, and Messages

You can configure all the following tips, instructions, and messages directly from the Questionnaire Administration pages, using the "Personalize..." links.

Tips and Instructions

Page	Region	Attribute Name	Message Name
QuestCreatePG	Create Questionnaire	Instruction	HR_QUEST_DEFINE _INSTR_SS
QuestCreatePG	Required Field Description	longMessage	HR_QUEST_HTML_ FIELD_INSTR
QuestPreviewPG	Required Field Description	Instruction	HR_QUEST_REVIEW _INSTR_SS
QuestOverviewPG	Search	Instruction	HR_QUEST_ADMIN _INSTR_SS
QuestOverviewPG	Search	Instruction	HR_QUEST_SRCH_I NSTR_SS
QuestOverviewPG	Results: Questionnaires	Instruction	HR_QUEST_RESULT S_INSTR_SS
QuestUpdatePG	Questionnaire Update Region	Instruction	HR_QUEST_UPDAT E_INSTR_SS
QuestUpdatePG	Required Field Description	longMessage	HR_QUEST_HTML_ FIELD_INSTR
QuestUpdPreviewPG	Required Field Description	Instruction	HR_QUEST_REVIEW _INSTR_SS

Confirmation Messages

Message Name	Message Meaning
HR_SAVE_FOR_LATER_NO_CHANGE	No changes have been made in the Update Questionnaire Page
HR_QUESTIONNAIRE_UPDATE_CONF	Questionnaire create/update/publish/unpublish Confirmation

Instruction Name	Instruction Meaning
HR_QUESTIONNAIRE_DELETE_WARN	Warning displayed for Delete Questionnaire

Flexfields

Questionnaire Administration uses no configurable flexfields.

Profile Options

Questionnaire Administration uses no unique configurable profile options.

Note for Customers who use the Questionnaire HTML Model (HR_QUEST_ADMIN_SS) and the Configurable Print Functionality

Using the Configure Print Options for Printable Page, if managers or workers try to print an appraisal that includes a questionnaire based on the Questionnaire HTML model (HR_QUEST_ADMIN_SS), only the answers get printed correctly in the PDF report.

For information on Configure Print Options for Printable page, see: Printing Appraisals, page 1-172

In place of questions, the report displays the following placeholder content for questions:

For example:

• Appraisee questionnaire section displays:

   First Question for appraisee goes here

   Second Question for appraisee goes here

• Main Appraiser questionnaire section displays:

   First Question for main appraiser goes here

   Second Question for main appraiser goes here

If you are using the HTML based questionnaire model and the Configurable Print functionality to print PDF of appraisals, then to ensure that the application retrieves questions from the database for the Print PDF report, you must manually enter questions in the print RTF template (predefined or custom).

Steps to manually enter questions in the print RTF template:

1. Download the print RTF template that is used to print appraisals.

2. Open the RTF template.

3. Navigate to the Questionnaire section. You can view the placeholder content for questions.

4. Replace the placeholder content for questions with the actual questions. For information on how to modify templates refer to: Oracle XML Publisher Administration and Developer's Guide and Oracle XML Publisher Report Designer's Guide.

5. Save your work.

6. Deploy the template using the XML Publisher Administrator responsibility.

Questionnaires based on the Questionnaire Administration (HR_QUEST_ADMIN_NEW_SS) can be printed using the Configurable Print feature without making any changes to the print RTF template, unless there is a requirement to customize the template.

Configuring Questionnaire Administration - New

This topic provides details about the Questionnaire Administration – New module.

Menu and Function Names

You can access the Questionnaire Administration module from the menus and functions in the table below.

Menu and Function Names

User Menu Name	Function Name
HR Professional	Questionnaire Administration - New (HR_QUEST_ADMIN_NEW_SS)
Questionnaire Functions Menu	HR_QUEST_ADMIN_SS (Questionnaire Administration) HR_QUEST_DEFINE_SS (Create Questionnaire)HR_QUEST_PREVIEW_SS (Preview Questionnaire)HR_QUEST_VIEW_SS (Preview Questionnaire)HR_QUEST_UPD_PREVIEW_SS (Preview Questionnaire)HR_QUEST_UPDATE_SS (Update Questionnaire)

> **Note:** Questionnaire Functions Menu is a submenu of Questionnaire
> Administration. To include the Questionnaire Administration function
> in a custom menu, include HR_QUEST_ADMIN_SS with a prompt and
> Questionnaire Functions Menu as a submenu without a prompt. Do not
> include prompts for the functions in the submenu.

Workflow

Questionnaire Administration uses no configurable workflow processes.

Tips, Instructions, and Messages

You can configure all the following tips, instructions, and messages directly from the
Questionnaire Administration pages, using the "Personalize..." links.

Tips and Instructions

Page	Region	Attribute Name	Message Name
QuestCreatePG	Create Questionnaire	Instruction	HR_QUEST_DEFINE_INSTR_SS
QuestOverviewPG	Questionnaire Administration - New	Instruction	HR_QUEST_ADMIN_INSTR_SS
QuestOverviewPG	Search	Instruction	HR_QUEST_SRCH_INSTR_SS
QuestCreatePG	Create Questionnaire	Instruction	HR_QUEST_DEFINE_INSTR_SS
QuestCreatePG	Create Questionnaire	Instruction	HR_QUEST_NEW_INSTR_SS
QuestUpdatePG	Update Questionnaire	Instruction	HR_QUEST_UPDATE_INSTR_SS
QuestUpdatePG	Update Questionnaire	Instruction	HR_QUEST_NEW_INSTR_SS

Confirmation Messages

Message Name	Message Meaning
HR_SAVE_FOR_LATER_NO_CHANGE	No changes have been made in the Update Questionnaire Page
HR_QUESTIONNAIRE_UPDATE_CONF	Questionnaire create/update/publish/unpublish Confirmation

Instructions in Dialog Pages

Instruction Name	Instruction Meaning
HR_QUESTIONNAIRE_DELETE_WARN	Warning displayed for Delete Questionnaire

Flexfields

Questionnaire Administration - New uses no configurable flexfields.

Profile Options

Questionnaire Administration - New uses no unique configurable profile options.

Creating Instruction Messages for Questionnaires and Questions

Administrators can create and use:

- Instruction message for a questionnaire.

- Instruction messages for questions in a questionnaire. The instruction messages can be of different types such as long tip, short tip, and instruction text. The instruction messages for a questionnaire and questions in the questionnaire help the appraisal participants to provide accurate feedback during the appraisal process.

As a prerequisite step, administrator must create the required instruction messages using the Functional Administrator responsibility, Messages feature. This will help in selecting the appropriate instruction message for a questionnaire and instruction messages for questions in a questionnaire.

Steps to create messages:

- Log on to the Functional Administrator responsibility.

- Click the Core Services tab.

- Click the Messages subtab. The Messages page appears.

For information on how to create and update messages, refer to the *Messages Page* topic in the

Oracle E-Business Suite Developer's Guide.

Info Online Links to Information Provider Websites

Info Online Links to Information Provider Web Sites

Info Online is a generic framework to integrate Oracle Applications with partner applications. Info Online enables users to access information from third-party providers and integrations. Once the links have been enabled, users can access an information provider web site directly from a button or link on an Oracle HRMS window or self-service web page. Depending on the level of configuration available, the link can lead directly to a page relevant to the window or even the record on which the user is working.

For example, someone entering tax information might access a web site providing up-to-date information on tax regulations, or an administrator looking at benefit details for an employee could open a web page providing documentation for that employee's benefit plan.

> **Note:** Info Online was previously known as the Knowledge Integrator.

See: Accessing Information Provider Web Sites, page 1-53

See: Integration between Oracle HRMS Products and Information Providers, page 1-55

Accessing Information Provider Web Sites

Oracle HRMS supports two versions of Info Online. The HR: KI Framework Version profile option value identifies the Info Online version.

Info Online Version 1

If the system administrator sets the profile to Version 1, users can access:

- RIA (Research Institute of America) through the user interface for some payroll forms

- Authoria, a provider of health insurance and compensation information, through links on some Benefits self-service web pages

- My Oracle Support (formerly Oracle Metalink), Oracle's support web site, though the Info Online button from the user interface

Info Online Version 2

If the system administrator sets the profile to Version 2, users can access:

- My Oracle Support and iLearning on self-service web pages in which the content container has been included

- Transcentive through the menu link from the professional user interface and self-services pages, after completing the setup steps.

- Enwisen through Oracle HRMS products after completing the setup steps

- Any other information provider with whom your enterprise has an agreement.

Accessing Information Providers from Oracle HRMS Interface

Info Online Button on Oracle HRMS Windows

Once the system administrator enables the links between Oracle HRMS and the information provider pages, users access information provider web sites from the user interface by clicking the Info Online button on the Oracle HRMS toolbar, or by selecting Tools > Info Online from the menu (Shift+Control+F7). This button is enabled in windows for which information provider links have been configured and enabled.

> **Note:** Shift+Control+F7 is the key sequence currently mapped to Function 7. Choose Help -> Keyboard on the menu to determine the actual key combination. The *Oracle Forms Deployment Guide* explains how to change this key assignment in the Oracle Terminal resource file fmrweb.res.

Clicking the Info Online button first opens a list of values, displaying a list of links to any information provider web sites that are enabled for the current window. When the user selects a value from the list, a browser window opens at the appropriate page.

If the user chooses the Info Online button from a window for which no links to information provider web sites are enabled, no list of values appears.

Users can control the behavior of the Info Online button using the Open in New Window option on the Tools menu. When this option is checked, each new search opens in a new browser window. This option allows users to compare results from different queries side by side, but the windows remain open until the user specifically closes them. When this option is unchecked, the page appears in the last browser window opened.

Info Online Content Container on the Oracle HRMS Products' Pages

Users access information provider web sites from the self-service web pages either through links on Benefits pages or through the Info Online content container. The list of applicable topics and providers appear alphabetically in the content container. See: Info Online Content Container, page 1-56

Integration between Oracle HRMS Products and Information Providers

Information Providers

Integration is available between Oracle HRMS and the following information providers:

My Oracle Support

My Oracle Support web site provides access to the latest product information, discussion forums, bug fixes, and patch information for Oracle HRMS, as well as enabling users to contact Oracle Support. Integration is available for all Oracle HRMS windows in the user interface in KI Framework Version 1 and for self-service web pages which include the content container in KI Framework Version 2. This integration is available for all legislations.

See My Oracle Support Note 229585.1 for details of how to set up links from Oracle HRMS to My Oracle Support pages.

Authoria HR

Integration is available between a number of Oracle Advanced Benefits windows and self-service pages and the third-party product Authoria HR in KI Framework Version 1. This integration is available for UK and US legislations. See: Links to Authoria HR, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Also see My Oracle Support Note 215637.1 for details of how to set up links from Oracle HRMS to Authoria HR pages.

RIA PCP on Checkpoint

Integration is available between Oracle HRMS US tax windows and third-party information provider RIA's Payroll Compliance Pro on Checkpoint in KI Framework Version 1. This integration is available for US legislations.

See My Oracle Support Note 148468.1 for further details of how to set up links from Oracle HRMS to RIA PCP on Checkpoint.

Transcentive

Integration is available between Oracle HRMS windows and Transcentive, a third-party compensation management solutions provider, in KI Framework Version 2. This integration is available for all legislations.

See My Oracle Support Note 294453.1 for further details of how to set up links from Oracle HRMS to Transcentive.

iLearning

Oracle iLearning is an enterprise learning management system that prescribes, delivers and tracks learning, and monitors and manages the learning process. Integration is available between the Rapid Implementation Workbench web pages and Oracle iLearning in KI Framework Version 2.

See My Oracle Support Note 294453.1 for further details of how to set up links from the Rapid Implementation Workbench web pages to Oracle iLearning.

Enwisen

Integration is available between Oracle HRMS products and Enwisen, a third-party information provider.

See: Info Online Links to Enwisen from Oracle iRecruitment Pages, *Oracle iRecruitment Implementation and User Guide*

See: Info Online Links to Enwisen from Oracle Performance Management Pages, page 1-59

See: Info Online Links to Enwisen from Oracle SSHR Pages, *Oracle Self-Service Human Resources Deploy Self-Service Capability Guide*

See: Info Online Links to Enwisen from Oracle Time and Labor Pages, *Oracle Time and Labor Implementation and User Guide*

See: Configuring Links between HRMS Products and Enwisen, page 1-59

See: Oracle white paper *Integrating Oracle Applications with Partner Applications* on Oracle *My Oracle Support* Note 294453.1 for further details of how to set up links from Oracle HRMS to Enwisen.

Info Online Content Container

The Info Online content container is an ancillary region that appears on self-service web pages. Topics and providers appear as an alphabetical list of links in the content container.

On clicking a topic, the list of providers who provide content for the topic appears in a new web page. If only one provider exists for the selected topic, the single provider's page opens immediately.

Users can also select a provider from the list in the content container, and view a list of topics offered by that provider.

The More link appears when the number of topics or providers exceeds a predefined limit. The limit of topics or providers is set in the HR: KI Maximum Topics and Integrations profile. If no limit is set, the More link appears when the number of topics or providers exceeds 3. On clicking the More link from the topics or providers region, the complete set of topics or providers appears in a new page.

Configuring Links between Oracle HRMS Products and Information Providers

You can configure links between Oracle HRMS products and information providers to enable users to access content on information provider web sites.

> **Note:** The information that your workforce can access on the information provider web site depends on the agreement with the information provider.

To configure links between Oracle HRMS products and information providers:

1. **Setting Profiles Options**

   Set the following profile options to set up links between Oracle HRMS and any information provider web sites:

   - HR: KI Framework Version

   - HR: Extension Agent Enabled

   - HR: Extension Agent Client Timeout

   Setting the following additional profile options is optional if you are setting up links between Oracle HRMS and any information provider web sites:

   - HR: Extension Agent

   - HR: Info Online: Open in New Window

   - HR: Info Online: Toolbar Icon

   - HR: KI Maximum Topics and Integrations

   - HR: Servlet Timeout

   - HR: KI Providers Enabled

   - HR: KI Topics Enabled

   - HR: KI User Options Enabled

   Additional required and optional profile options exist for individual information providers. See: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

2. **Configure links to information providers**

   After you configure Info Online, you can access configured partners in self service pages through the Info Online content container and in forms through the Info Online icon. You can also access configured partners as a menu link.

   For more information on configuring links to information providers, see: Oracle white paper *Integrating Oracle Applications with Partner Applications* on My Oracle Support Note 294453.1

3. **Display the Info Online content container, if hidden by default**

   The links to information providers are available in the Info Online content container on the Oracle HRMS products' pages. If the content container is hidden by default, then use the Personalization Framework functionality to display the content container on the appropriate applications pages.

Info Online Links to Enwisen

Info Online Links to Enwisen from Oracle Performance Management Pages

You can configure access between Oracle Performance Management and Enwisen, a third-party information provider to enable end users to access company specific information or any other relevant information hosted on the Enwisen web site. The Info Online content container on the self-service pages displays hypertext links to information providers.

The Performance Management page available from the Manager Self-Service and Employee Self-Service responsibilities contains the Info Online content container, which is hidden by default. This content container includes the Handbook link (default link) to access, for example, your company's information on performance appraisals.

To enable users to access Enwisen, complete the following steps. Using the Personalization Framework function:

- Display the Info Online content container.

- Display the default Handbook link or configure links to Enwisen according to your agreement with Enwisen.

See: Configuring Links between HRMS Products and Enwisen, page 1-59

Configuring Links between HRMS Products and Enwisen

If your enterprise has an agreement with Enwisen, a third-party information provider to enable your workforce access company specific information or any other relevant information hosted on the Enwisen web site, then you can configure links to Enwisen.

> **Note:** The company information that your workforce can access on Enwisen depends on your agreement with Enwisen.

See: Info Online Links to Enwisen from Oracle iRecruitment Pages, *Oracle iRecruitment Implementation and User Guide*

See: Info Online Links to Enwisen from Oracle Performance Management Pages, page 1-59

See: Info Online Links to Enwisen from Oracle SSHR Pages, *Deploy Oracle SSHR Self-Service Capability Guide*

See: Info Online Links to Enwisen from Oracle Time and Labor Pages, *Oracle Time and Labor Implementation and User Guide*

To configure links between HRMS products and Enwisen:

The following section lists the basic implementation steps that are required to configure links between Oracle HRMS products and Enwisen.

1. Set the HR: Extension Agent profile option to enable the Info Online functionality.

   See: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

2. Set the HR: Enwisen Login URL profile option.

   See: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

3. Enable the Info Online content container and Topics region by setting an applicable value for the HR: KI Topics Enabled profile option.

   See: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

   See: Info Online Content Container, page 1-56

4. Use the Personalization Framework function to display the Info Online content container on the product pages that support Enwisen integration. The content container is hidden by default on the following pages:

   • **iRecruitment**

     Manager and Recruiter Home page

   • **Oracle Self-Service HR**

     Absence Management page (Manager Self-Service and Employee Self-Service responsibilities)

     Personal Information page (Employee Self-Service responsibility)

   • **Oracle Performance Management**

     Performance Management page (Manager Self-Service and Employee Self-Service responsibilities)

   • **Oracle Time and Labor**

     Recent Time Cards page

5. Enter the login and authentication details that you receive from Enwisen for Enwisen:Provider integration option on the Integration Options page.

   To provide the details:

   • Log on to the Info Online Administrator responsibility.

- Click the Info Online Options link.

- Search for the Enwisen:Provider integration option on the Integration Options page.

- In the Option Name region, set the Enabled and User Visible options to Yes.

Mandatory Details

Provide the following mandatory information:

- Enwisen Subscriber Name

- Enwisen TPPassword

- Enwisen TPUserID

Enwisen Secret Key

In the Enwisen Secret Key field enter the Enwisen authentication key.

Additional Implementation Steps:

After you implement the basic steps, you can carry out the following steps to define user specific additional security to access Enwisen. For example, depending on your business requirements, you can:

- Restrict access to information on Enwisen based on criteria such as jobs, positions, or departments. Additionally, you can restrict information to different users such as employees, line managers, and HR personnel.

- Enable specific users to view data across geographical areas. For example, if your enterprise has a global presence, then the Vice President of the HR team may require access to recruitment policies across geographic locations. You can define security options to enable the vice president to access the required information.

To define additional security when accessing Enwisen:

1. Enwisen requires users to log in to access the provider's site for information. To define additional security depending on your business requirements, you must create a Java class that implements Oracle's predefined Java interface: oracle.apps.per.ki.kiserver.KIDataFetcher. The Java class contains the method to retrieve login values when end users access Enwisen from Oracle HRMS product pages.

   For technical details of creating a Java class, see: Oracle white paper *Integrating Oracle Applications with Partner Applications* on My Oracle Support Note 294453.1

2. Provide the Java class value in the HR: Class Name to Fetch KI Data profile option to enable users to launch Enwisen from Oracle HRMS product pages that support

Enwisen integration.

See: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Workforce Performance Management Overview

Workforce Performance Management Overview

Successful enterprises set objectives for their workers that are consistent with the enterprise strategy and that contribute to business goals. To support enterprise-directed objective setting, management, and assessment, Performance Management provides an integrated set of *Workforce Performance Management* functions. Enterprises can:

- Define objectives consistently and allocate them efficiently throughout the enterprise.

- Align worker objectives with the strategy and goals of the business.

- Track worker achievement of objectives.

- Assess worker performance in the delivery of objectives.

Workers can participate in the objective-setting process and understand how their performance contributes to business outcomes.

The Performance-Management Process

Using Oracle Performance Management, you manage workforce performance for a specified period of time, such as a calendar or financial year, and for a specified workforce, such as all workers in a supervisor hierarchy or in an organization. To define performance-management activities, the HR Professional creates a *Performance Management Plan* (PMP), a configurable control document that can define:

- Objective-setting and objective-tracking processes

- Appraisal-management processes

You select both options in your PMP to take full advantage of the performance-management functions. Alternatively, you can define a PMP to manage objectives only or appraisals only. You can define as many PMPs as the enterprise requires, and a worker can belong to multiple PMPs. For more information, see Performance Management Plans, page 1-73

To start the performance-management process, the HR Professional *publishes* the PMP. At this point, the application:

- Creates a *personal scorecard* of objectives for each member of the plan.

- Generates a list of tasks for workers and managers that drive performance-management activities. Each task that the application generates

belongs to one of three processes:

- Objective Setting

- Objective Tracking

- Appraisal

The Objective-Setting Process

During this process, which lasts for the period specified in the PMP, worker and manager update the worker's personal scorecard by adding, updating, or removing objectives. The personal scorecard transfers between worker and manager until the objective-setting process is complete. The manager then approves the worker's personal scorecard to change its status to Published.

The Objective-Tracking Process

During this process, worker and manager can:

- View the worker's personal scorecard.

- Record progress made against each objective.

Workers and managers can update objectives during a specific stage of the performance process, even though the View and Track Objective Progress task is enabled throughout the performance-management period.

- If the PMP includes only the Objective Setting task, then record progress for objectives within the objective setting period after the completion of the Finish objective setting task.

- If the PMP includes both the Objective Setting and Appraisals tasks, then record progress for objectives within the objective setting period after the completion of the Finish objective setting task, and before the appraisal task start date.

The Appraisal Process

During this process, which can occur multiple times during the performance-management period:

- The application creates appraisals automatically for all PMP members on a date that you specify. The application copies the worker's personal scorecard of objectives to the Objectives section of the appraisal.

- Manager and worker conduct the worker's appraisal.

The following figure summarizes the performance-management process:

The Performance
Management Process

Performance Management Plan

Manager and Worker
Tasks

Objectives Library

Incomplete Previous
Objectives

Objective
Setting

Personal Scorecards

Objective
Tracking

Appraisals

Appraisal
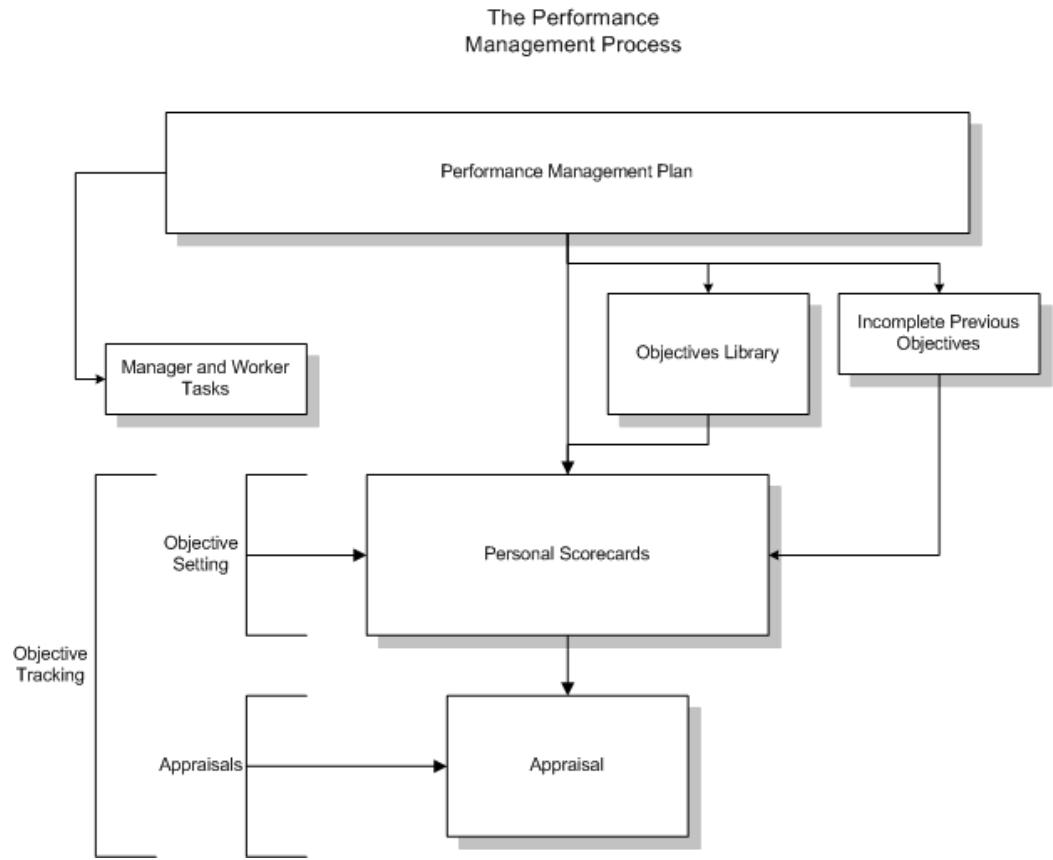
When you publish a PMP, the application generates tasks for workers and managers and a personal scorecard of objectives for each plan member. The application can copy to each personal scorecard:

- Objectives from the Objectives Library for which the worker is eligible

- Incomplete objectives from the worker's previous scorecard

Workers and managers complete worker scorecards during the objective-setting process and appraise performance during the appraisal process. Workers and managers can view personal scorecards and track progress throughout the performance-management period.

Key Functions of Workforce Performance Management

Oracle Performance Management provides a rich set of functions to support workforce-performance management and appraisal.

The Objectives Library

HR Professionals can create a *library* of standard, reusable objective definitions for the enterprise to promote efficiency and consistency. Workers and managers can search this

library for objectives to copy to personal scorecards, and the application can automatically allocate objectives from the library to eligible workers.

To populate the library, HR Professionals can either create individual objective definitions or import them from other sources using Oracle Web ADI.

See: The Objectives Library, page 1-103

Automatic Allocation of Objectives

Performance Management can automatically allocate objectives from the Objectives Library to workers based on eligibility rules that you define in eligibility profiles. This function enables you to allocate some or all objectives efficiently throughout the enterprise.

See: Allocating Objectives to Workers Automatically, page 1-115

Objective Definition

The objective-definition functions support the creation of specific, measurable, achievable, relevant, and time-based (SMART) objectives. For example, you can specify how you will measure achievement of objectives, include target dates, and mark objectives for inclusion in appraisals. You can also include links to attachments and provide supporting descriptions. Managers can define objectives for workers, and workers can define objectives for themselves, subject to management approval.

See: Creating Objectives, page 1-104

Cascade Objectives Through the Enterprise Hierarchy

Managers can *cascade* their own objectives to workers reporting directly to them, either by duplicating their own objectives or by creating new, related objectives. Those workers can repeat the process for workers reporting to them, and so on throughout the enterprise hierarchy. Cascaded objectives constitute an objectives hierarchy, with each objective supporting an objective above it in the hierarchy.

See: Cascading Objectives, page 1-110

Define Relationships Between Objectives

Workers can *align* their objectives with objectives that other workers have *shared* with them as a way of establishing a network of relationships between objectives.

See: Sharing and Aligning Objectives, page 1-118

Automatic Creation of Appraisals

You can generate appraisals automatically from the PMP. Performance Management creates appraisals on a specified date for all members of the PMP using the appraisal template that you select. The application also assigns the appraisal to the initiator that you identify and automatically includes each worker's personal scorecard of objectives

in the Objectives section of the appraisal. This approach is highly efficient, as individuals do not have to create appraisals or populate the Objectives section. It also enables you to enforce both the timing and the format of the appraisal. This function is completely integrated with and enhances the appraisal process.

See: The Appraisal Process, page 1-158

Using the Switch as Manager and Switch as Employee Functions

Switch as Manager

The Switch as Manager function appears by default on the Performance Management home page of the Manager Self-Service and HR Professional responsibilities. Using the Switch as Manager function:

- HR Professionals can work as another manager including the top manager in the plan hierarchy. This function enables an HR Professional to access Performance Management Plans of the switched manager and work on the performance-management tasks.

- Managers can work as another manager and access that manager's performance-management tasks. For example, the Director of the Sales division North America reports to VP Sales North America. The VP can access Performance management plans of the Director and carry out performance-management plan tasks on behalf of the director.

Switch as Employee

The Switch as Employee function appears by default on the Performance Management home page of the HR Professional responsibility. This function enables an HR Professional to work as another employee and access that employee's performance-management tasks.

> **Note:** The Switch as Manager and Switch as Employee functions are available only for the objective setting and tracking tasks in a PMP.

Key Concepts

The following topics explain the PMP tasks for managers, workers, and HR Professionals.

See: Manager Performance-Management Tasks, page 1-126

See: Worker Performance-Management Tasks, page 1-138

See: HR Professional Performance Management Tasks, page 1-131

See: Performance-Management Plan Administration Tasks, page 1-142

Setting Up Workforce Performance Management

Before you can use the Workforce Performance Management functions, some setup steps are required.

To set up Workforce Performance Management:

1. Add the Objectives Library function to appropriate HR Professional menus. This function appears on Performance Management home page for HR Professionals and HRMS Manager Career Management menus by default.

   As access to the function enables users to perform all objectives-library tasks, do not allow general access to this function.

   See: Defining Menus, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

2. Add the Performance Management Plans function to appropriate menus. This function appears on Performance Management home page for HR Professionals and HRMS Manager Career Management menus by default. Access to this function enables users to create new plans and query plans to which they have access. Users can access plans that they administer and plans administered by people to whom they have access.

   See: Defining Menus, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

3. The Manage Appraisal Templates, Manage Objective Assessment Templates, and Manage Competency Assessment Templates functions appear by default on the HR Professional Responsibility menu. Add these functions to other menus, if appropriate.

   See: Defining Menus, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

4. HR Professionals can import objectives to the Objectives Library using Oracle Web ADI. Ensure that relevant users have access to Web ADI and that you have configured Web ADI correctly.

   See: Implementing Web ADI for Use with Oracle HRMS, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

5. Populate the following lookups:

   • HR_WPM_MEASURE_UOM

     For objectives with a quantitative measurement style, this lookup identifies units of measure, such as percentage, weight, number, and currency values.

   • HR_WPM_PRIORITY

Using this lookup, users can allocate a relative priority to objectives (for example, low, medium, or high).

- HR_WPM_GROUP

    Using this lookup, users can group objectives into types (such as Communication, Management, and Personal Development).

- HR_WPM_WEIGHTING

    This lookup defines a scale of weighting values (integers) for use throughout the enterprise. For example, the values could be 1, 2, 3, 4, and 5, where the value 5 indicates an objective of greater importance than the value 1.

    You can change the meaning and description of the tasks that appear on the Performance Management Task List for managers and workers using the following lookups:

    - HR_WPM_MANAGER_TASKS for manager tasks

    - HR_WPM_WORKER_TASKS for worker tasks

    The application uses the same lookups to display manager or worker tasks when an HR Professional switches as manager or employee.

    > **Note:** You cannot reorder the manager or worker tasks that appear on the Performance Management Task List.

    See: Adding Lookup Types and Values, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

6. You can use eligibility profiles to:

    - Allocate objectives to workers automatically based on eligibility profiles.

    - Further define the set of workers who will be the plan members within the supervisory hierarchy.

    - Roll out different appraisal templates to different sets of the plan population.

    To use these functions, you must create eligibility profiles before creating performance management plans.

    See: Defining an Eligibility Profile, *Oracle HRMS Compensation and Benefits Management Guide*

    The following section provides an example of how you can use eligibility profiles to define the plan population for your performance management plans:

    This example uses Vision Corporation business group that has locations in San

Francisco, San Jose, and San Diego. William Tucker holds the Vice President-North America Sales position and wants to review scorecards and appraisals of all workers who hold the Senior Sales Manager position, placed on Grade 4, and located in San Diego, San Francisco, and San Jose offices.

To meet this requirement:

1. Navigate to the Participation Eligibility Profiles window. Select the Vision Corporation business group. Enter the name of the eligibility profile, select the Employee Assignment Only assignment type, Active as the status, and Benefits as the applies to.

   Click the Employment tab.

   Select Position and then select senior sales manager value.

   Select Grade, and then select 4 as the grade value.

   Select Work Location, and then select San Diego, San Francisco, and San Jose as the location values.

   Save your work.

2. Create a performance management plan and associate the eligibility profile created in Step 1 to the performance management plan.

See: Performance Management Plans, page 1-73

When you publish the plan, the plan tasks automatically appear on the Performance Management page of workers who meet the eligibility criteria.

7. When employees create objectives and add objectives' details, their managers can update the objectives and objectives' details. Your enterprise has the flexibility to determine whether managers can update the objectives and objectives' details added by employees using the HR: Allow Updates to Objective Details Added by Appraisee profile option. See: Profile Options, page 1-24

8. Managers and workers can view performance management plans that are historical (plans with start and end dates earlier than the system date) on their home page. In the HR: View Historical Plans (YYYY/MM/DD) profile option, enter the effective date from when you want to display historical plans. For example, if you enter 2005/01/01 as the profile option value, then the application displays plans with the start date on or after 2005/01/01.

   You can set this profile option at the Site, Application, Responsibility, or User level.

   If you leave the profile option blank, then the application displays active plans with a start date earlier than the system date and an end date later than the system date.

9. On the Performance Management home page for managers, the Switch Manager function appears by default. This function enables a manager to work as another manager (typically one lower in the management hierarchy) and access that

manager's performance-management tasks. To disable this function, personalize the Performance Management home page to remove the Switch Manager button.

10. When the application creates appraisals automatically from a Performance Management Plan or you run the Mass Appraisal Creation for WPM program, some errors are likely to occur and are to be expected. Therefore, you *must* set the action parameter Maximum Errors Allowed (MAX_ERRORS_ALLOWED) to a value that is realistic for the volume of data. Otherwise, the appraisal-creation process may fail.

> **Note:** If your enterprise also runs payroll processes, Maximum Errors Allowed may already be set to an appropriate value.

To access the Action Parameters window, select Action Parameters from the Other Definitions menu.

11. Managers and workers can view the alignment of their objectives with that of their manager, reports, or peers on the Line of Sight page. The Line of Sight page displays the alignment of objectives in the following regions:

• View Downward Alignment of Objectives

• View Upward Alignment of Objectives

Depending on your business requirements, you can hide appropriate regions using the Personalization function

12. When HR Professionals create or update performance management plans they can add attachments to plans and make the attachments globally available in Oracle E-Business Suite of applications using the Publish to Catalog feature.

Performance management plan attachments that are published to catalog are available to other users if:

• The Attachments feature is enabled on Oracle Applications pages.

• The Search from Catalog option is enabled on the Oracle Applications pages.

If you do not want HR Professionals to use the Publish to Catalog feature for attachments in plans, then you can hide the Publish to Catalog column on the Create Plan: General Information and Update Plan: General Information pages using Personalization.

13. Performance Management Plan (PMP) administrators can send notifications to all members of a plan or to a specific set of the plan population using the Run Mass Notification programs. For more information, see: Running the Mass Notifications Program, page 1-100

When running the program, plan administrators can select messages that Oracle delivers or custom messages. To enable plan administrators to select custom messages, you must create them using the Messages window. For more information on creating messages, see: Messages Window, *Oracle E-Business Suite Developer's Guide*

Performance Management Plans

Performance Management Plans

The Performance Management Plan (PMP) defines the performance-management process for a specified period, such as a calendar year. It identifies:

- Who is a member of the plan

- How you will set objectives for plan members

- Whether the application will create appraisals automatically for plan members

- The tasks workers and managers will perform throughout the process

HR Professionals create and manage the PMP using the Performance Management Plans function.

Specifying General Information

On the Create Plan: General Information page, you specify the:

- Plan name. As this name is also the name of each personal scorecard, devise a meaningful naming standard to identify the plan clearly.

- Plan administrator, who manages the plan (who can update it, for example) and is the signed-on user, by default. You can select a different administrator from the list of people your security profile enables you to access.

   > **Note:** If you are the plan administrator but are not a member of the plan, the plan does not appear automatically in your Performance Management Task List. You can use the Switch Manager function to access the plan as a manager who is a plan member.

- Previous plan. Provide this value if you want personal scorecards to include incomplete objectives from the scorecards of a previous plan.

- Plan start and end dates. These dates define the performance-management period. When you set these dates, allow sufficient time to complete any end-of year appraisal activity. For example, a plan for 2006 could have a start date of 01 January, 2006, and an end date of 31 January, 2007, to allow time for the end-of-year appraisal.

You can also identify attachments to appear in each personal scorecard. For example, you could include information about defining SMART (specific, measurable, achievable,

relevant, and time-based) objectives or a document about the enterprise goals.

An Add Attachment pop-up window appears when you move the mouse over the Add Attachment button. You can use this window to add your attachments.

Publish to Catalog Feature

If the Publish to Catalog column is available, then when you add attachments to a plan, and use the Publish to Catalog feature, the attachments are available globally in Oracle E-Business Suite of applications. Performance management plan attachments that are published to catalog are available to other users if:

- The Attachments feature is enabled on Oracle Applications pages.

- The Search from Catalog option is enabled on the Oracle Applications pages.

Therefore, you must exercise caution when you use the Publish to Catalog feature.

Selecting the Plan Population

On the Create Plan: Population page, you identify the plan members by selecting part or all of a hierarchy: organization, position, or supervisor. For workers belonging to a hierarchy, Performance Management automatically generates personal scorecards of objectives when you publish the plan.

See: Personal Scorecards, page 1-122

> **Note:** Your enterprise must define a supervisor hierarchy to use Performance Management Plans. Currently, when you select either the organization or position hierarchy to identify the plan population, the application uses the selected hierarchy to publish the plan. After the plan is published to the selected population, the application uses supervisory hierarchy for the following tasks:
>
> - Set objectives for plan members
>
> - Create appraisals for plan members

When you choose to publish a plan for contingent workers or employees only, then the topmost supervisor of the plan must be of contingent worker type or employee type as appropriate. One of the basic rules of the population definition is that a plan that includes only contingent workers cannot have the employee worker type as the supervisor. In such cases, the plan population must include both contingent workers and employees. The application first evaluates the population definition and then applies the eligibility profile criteria.

Select an eligibility profile to further define the set of workers who will be the plan members within the identified plan population. You can publish a PMP to members who meet the eligibility profile criteria. For example, using an eligibility profile, you can publish a performance management plan to workers on a specific grade or position.

Specifying the Plan Process

On the Create Plan: Process page, you tailor the performance-management process to suit enterprise requirements. Briefly, you can:

- Include both objective setting and automatic appraisal creation.

- Exclude objective setting.

- Exclude automatic appraisal creation.

Including both Objective Setting and Appraisal Creation

For the objective-setting process, you can specify:

- When objective setting must occur. The objective-setting period must be:

  - The same as or wholly within the plan period

  - Complete before any appraisal-task start date

  The objective-setting period is usually at the start of the performance-management period. If your PMP includes multiple appraisal tasks, you may want to set multiple objective-setting periods. In this case, you update the published PMP to set the next objective-setting deadline.

  > **Note:** If your enterprise uses the Talent Profile feature in Oracle Succession Planning or Oracle SSHR, then to display details of objectives in the Performance Objectives region of the Talent Profile page you must select the Include Objective Setting in Process check box. This action ensures that managers can view objectives when they navigate to the Talent Profile of workers in their hierarchy.

  See: Updating Performance Management Plans, page 1-81

  If you also select Allow Changes Outside This Period, then workers and managers can update personal scorecards outside objective-setting periods. In this case, the end date of an objective-setting period is a proposed deadline only.

- Whether you will use the cascading or parallel objective-setting process. This selection determines who starts the objective-setting process (managers or workers).

  See: Cascading Objectives, page 1-110

  See: Setting Objectives in Parallel, page 1-113

- Whether personal scorecards will automatically include objectives from the Objectives Library for which workers are eligible.

See: Allocating Objectives Automatically, page 1-115

- Whether personal scorecards will include incomplete objectives (objectives with no achievement date). The application looks for these objectives in the worker's previous scorecard (identified on the Create Plan: General Information page).

- Whether sharing and alignment of objectives are enabled. These features enable workers to construct a hierarchy of related objectives.

  See: Sharing and Aligning Objectives, page 1-118

- Whether original objectives from the Objectives Library must be reallocated.

  The Reallocate Objectives check box appears automatically when you select the Auto Allocation check box. By default, this check box is not selected. To meet their business goals, enterprises may like to automatically allocate corporate objectives from the Objectives Library into workers' scorecards. To meet this business requirement, you can select the Reallocate Objectives check box to reallocate corporate objectives whenever a performance management plan is republished. When you select the Reallocate Objectives check box and republish the plan, the application replaces automatically allocated objectives that are updated in the scorecards, with original objectives from the Objectives Library. For example, when managers transfer, approve, or reject a scorecard, and the plan is republished with the Reallocate Objectives check box selected, the objectives in the scorecard are replaced with the original objectives from the objectives library.

  If you do not select this check box, then the application retains all changes made by workers and managers to the automatically allocated objectives in the scorecard.

  > **Note:** During the objective-setting period, the application can reallocate objectives from the Objectives Library regardless of the status of the employees' scorecards. For example, if the Reallocate Objectives check box is selected and the scorecards are at the Published status, then the objectives in the scorecards are replaced with the objectives from the Objectives Library when a plan is republished.
  >
  > During the appraisal cycle, if appraisals are approved, then the application does not reallocate objectives when you republish a plan.

When you publish the plan, the application generates objective-setting and objective-tracking tasks for plan members.

If you select Include Appraisals in Process, the application can create appraisals automatically for plan members. In a single PMP, you can define multiple appraisal tasks. For example, you can define midyear and full-year appraisals. For each appraisal task, you can:

- Select an appraisal template.

  See: Selecting Appraisal Templates, page 1-78

- Specify when the application will generate the appraisals, by setting Create Appraisals to Yes and entering the number of days before the start of the appraisal task.

- Specify whether the application will allocate appraisals to the main appraiser or the appraisee.

For each appraisal, the task start date must be after the appraisal-period start date.

The application automatically configures the Objectives section of the appraisal using the objective-assessment template identified in the appraisal template, and populates the Objectives section with the worker's personal scorecard.

When you publish the PMP, the application generates appraisal-process tasks for plan members and schedules a concurrent process to create appraisals on the specified dates, if appropriate.

If you set Create Appraisals to No, the application does not create appraisals automatically for this plan. Instead, you can run the Mass Appraisal Creation program at a convenient time.

See: Running the Mass Appraisal Creation Program, page 1-99

Excluding Objective Setting

If you do not include objective setting in your PMP, when you publish the plan the application:

- Generates personal scorecards and populates them with any incomplete objectives and automatically-allocated objectives. The scorecard status is Published.

- Does *not* generate objective-setting and objective-tracking tasks but does generate appraisal-process tasks.

- Generates appraisals on the specified dates, if you have set Create Appraisals to Yes. Otherwise, you can run the Mass Appraisal Creation program at a convenient time. The Objectives section of the appraisal includes personal scorecards as generated on plan publication.

  See: Selecting Appraisal Templates, page 1-78

Excluding Appraisal Creation

If you do not include appraisal creation in your PMP, when you publish the plan the application:

- Generates personal scorecards and populates them with any incomplete objectives and automatically-allocated objectives

- Does not generate appraisal-process tasks but does generate objective-setting and objective-tracking tasks

- Does not create appraisals automatically

  You cannot run the Mass Appraisal Creation program to create appraisals for this plan.

If you create appraisals individually using the Appraisals function, the configuration of the Objectives section depends on the appraisal template you select. The application does not copy a worker's personal scorecard to the Objectives section as there is no link between personal scorecards and appraisals created outside the PMP.

Selecting Appraisal Templates

Appraisal templates that you include in a PMP must:

- Be valid throughout the relevant appraisal period.

  Assessment templates that you include in the appraisal template must also be valid throughout the appraisal period.

- Be valid for the plan population.

  If your plan population spans multiple business groups, then you must select global appraisal templates. If your plan population is in a single business group only, then you can use either global or local appraisal templates. However, any local appraisal template must be from the same business group as the plan population.

  If you include an appraisal template that is not valid for the plan population, then plan publication fails.

- Include an objective-assessment template, if you include objective setting in your PMP. Otherwise, Performance Management cannot configure the Objectives section of the appraisal.

Use the eligibility profile criteria to roll out different appraisal templates to different sets of the plan population. When you identify an appraisal template for the plan population, you can associate an eligibility profile with the appraisal template. Performance Management uses the eligibility profile criteria to roll out the appraisal to a specific set of workers within the plan population. For example, for workers on grade M, you can roll out the Manager appraisal template that includes a questionnaire for managers, and for workers on Grade E, you can roll out the Executive appraisal template that includes a questionnaire for executives.

See: The Appraisal Template, page 1-187

Reviewing the Plan

The Create Plan: Review page shows the tasks Performance Management will generate for workers and managers when you publish the plan. The list of tasks varies according to configuration options selected on the Create Plan: Process page. For example, if you do not include objective setting in your performance-management process, the application does not generate objective-setting tasks.

Publishing the Plan

A Performance Management Plan has no effect until you publish it. When you publish the plan, the application automatically generates personal scorecards for all plan members and a list of tasks to guide plan members through the performance-management process.

See: Personal Scorecards, page 1-122

See: Manager Performance-Management Tasks, page 1-126 and Worker Performance-Management Tasks, page 1-138

> **Note:** You can only inactivate the plan. For more information, see: Inactivating Published Performance Management Plans, page 1-80
>
> Although you can update some parts of a published plan, you cannot make major revisions. Therefore, ensure your Performance Management Plan is complete and correct before you publish it.

Monitoring the Plan

Once a plan is published, you can use the Performance Management Plans function to monitor plans to view scorecard and appraisal details.

See: Monitoring and Rolling Back Published Plans, page 1-92

Updating the Published Plan

You can update a published plan, though there are significant restrictions on the changes you can make.

See: Updating Performance Management Plans, page 1-81

Rolling Back Published Plans

If required, HR Professionals can roll back published plans. However, they cannot roll back completed plans or plans that are inactive.

See: Monitoring and Rolling Back Published Plans, page 1-92

Viewing Appraisal Summary

The Performance Management Plan Appraisal Rating Summary provides managers information on progress of appraisals in their hierarchy.

See: Viewing Performance Management Plan Appraisal Rating Summary, page 1-93

Inactivating Published Performance Management Plans

After you publish a performance management plan, you can inactivate a plan so that the plan is not displayed to the concerned population on their Performance Management Home page. For example, you have published a plan for the next annual year and you do not want managers to start their performance management plan tasks, then you can inactivate the plan. Click the Inactivate/Publish icon to inactivate a plan. To make an inactive plan visible, search for the plan using the Inactive status and then click the Inactivate/Publish icon.

Performance-Management Plan Administrator Tasks

Using the Performance Management Plan Administration Home Page, HR Professionals can perform the following tasks for published performance-management plans:

- Enroll workers into published plans

- Remove worker scorecards

- Reopen worker scorecards

- Refresh worker scorecards

- Reopen appraisals of workers

The application sends notifications when plan administrators perform these tasks.

See: Performance-Management Plan Administrator Tasks, page 1-142

Duplicating Plans

Using the Performance Management Plans page, you can search for existing plans and duplicate a required plan. When you duplicate a plan, you can change the general information, select different population, and change the objective setting and appraisal process. When you duplicate a plan, the combination of name and validity dates must be unique. Note that, when you duplicate a plan, the application does not duplicate attachments.

Updating Performance Management Plans

You can update a published Performance Management Plan (PMP) and republish it to disseminate relevant changes to plan members. For example, if you update a published plan to include objective setting, the application generates personal scorecards and objectives-related tasks when you republish the plan. However, some restrictions apply to the changes that you can make.

Items You Can Change in a Published PMP

On the Update Plan: General Information page, you can change the plan end date.

On the Update Plan: Process page, you can:

- Select, but not deselect, any of the following options:

    - Include Objective Setting in Process

    - Sharing and Alignment (if Include Objective Setting in Process is also selected)

    - Include Appraisals in Process

    - Allow Changes Outside This Period

    - Automatic Allocation

    - Notify Plan Population

- Change the objective-setting start date, provided that neither the current date nor the new date is in the past.

- Change the objective-setting deadline date, provided that the new date is before the task-start date of the next appraisal.

- Change Appraisal Task start date when objective setting deadline is extended.

    Important: If the Mass Appraisal Creation program is scheduled to run automatically, then ensure that you cancel the program when you make this change and republish the plan.

    The Mass Appraisal Creation program includes the Delete Pending Transactions parameter with a default value of No. When you publish a plan, the program, if scheduled to run automatically uses the default value. You can set the value to Yes, if you want to delete pending transactions for any scorecards, and proceed with the appraisal creation.

- Extend the Appraisal task end date beyond the PMP end date. By default, the appraisal task is disabled after the PMP end date. Enterprises may have certain business requirements, such as, enabling workers who go on long leave to update appraisals after the PMP end date. To meet such requirements, you can enter an appraisal task end date, which is later than the PMP end date. When you republish the PMP, the application enables the Appraisal task icon on the Performance Management home pages of appraisal participants.

- Add, update, or delete an appraisal until the plan start date, if Create Appraisals is set to Yes (indicating that the application is scheduling appraisal creation). If Create Appraisals is set to No, then you can add or delete an appraisal provided that you have not already run the Mass Appraisal Creation program for that appraisal task. After the plan start date you can only update the Task End Date of the appraisal, regardless of the appraisal period and tasks dates.

- Change the Period Start Date, Period End Date, Task Start Date, Create Appraisals, and Days Before Tasks Start, if the Include Objective Setting in Process check box is selected, and if you want to extend the objective-setting deadline date.

On the Update Plan: General Information page, you can update the flexfield and any attachments. If the Publish to Catalog feature is available when you update any attachments, exercise caution while using this feature. For more information, see: Publish to Catalog, page 1-74

You cannot update the Create Plan: Population page in a published plan.

When you republish the plan, the application can include additional objectives in personal scorecards for which workers have become eligible since you last published the plan.

See: Updating Objectives, page 1-107

Changing the Objective-Setting Deadline

When you change the objective-setting deadline date in a published PMP, the application needs to determine whether you are simply extending the current deadline or specifying a new objective-setting period.

If your new objective-setting deadline is before the first appraisal-task period following the previous objective-setting deadline, the application assumes that you are extending the current objective-setting period. In this case:

- If you do not select Reset Scorecard Statuses, then the new objective-setting deadline applies only to plan members who have not yet completed the objective-setting task; the application makes no changes to scorecard statuses.

- If you select Reset Scorecard Statuses, then the application resets the status of *all* personal scorecards to either With Worker or With Manager when you republish the plan so that all plan members can set objectives during the extended objective-setting period.

If your new objective-setting deadline is after the first appraisal task period following the previous objective-setting deadline (and that appraisal task is complete), the application assumes you are specifying a new objective-setting period for a subsequent appraisal task. In this case, the application automatically selects Reset Scorecard Statuses and resets the status of all personal scorecards to With Worker or With Manager when you republish the plan. Workers can then set objectives for the next appraisal task.

> **Note:** You cannot change the objective-setting deadline to a date that is after a *future* appraisal task.

For example, assume your published PMP is as follows:

Activity	Date
Objective-Setting Start Date	01 January 2007
Objective-Setting Deadline	31 January 2007
Midyear Appraisal Task Start Date	15 June 2007
Midyear Appraisal Task End Date	30 June 2007
Full-Year Appraisal Task Start Date	15 December 2007
Full-Year Appraisal Task End Date	31 December 2007

If you change the objective-setting deadline on 7th February, 2007 to 31 March, 2007, then, as the new deadline is still before the midyear appraisal (15 June through 30 June), Performance Management assumes you are extending the objective-setting period for the midyear appraisal. If you also select Reset Scorecard Statuses, the application extends the objective-setting period for all plan members when you republish the plan. Otherwise, the new deadline applies only to workers who have not yet completed setting their objectives.

If you change the objective-setting deadline on 2 July, 2007 to 31 July, 2007, then, as the new deadline is after the completed midyear appraisal, Performance Management assumes you are specifying a new objective-setting period for the next appraisal in this plan (the full-year appraisal). The application automatically resets scorecard statuses to With Worker or With Manager when you republish the plan so that all workers can set

objectives for the next appraisal task.

Using the Plan Republishing Options

As an HR Professional or a plan administrator, when you update and republish a plan, you can select a specific republish option, a combination of options, or all of the republish options. The Republish Options are available in the Update Plan: Review page.

See: Using the Performance Management Plan Republishing Options, page 1-86

Status Values of Performance Management Plans

The following figure summarizes the Performance Management Plan's status values:

Performance Management Plan Status Values
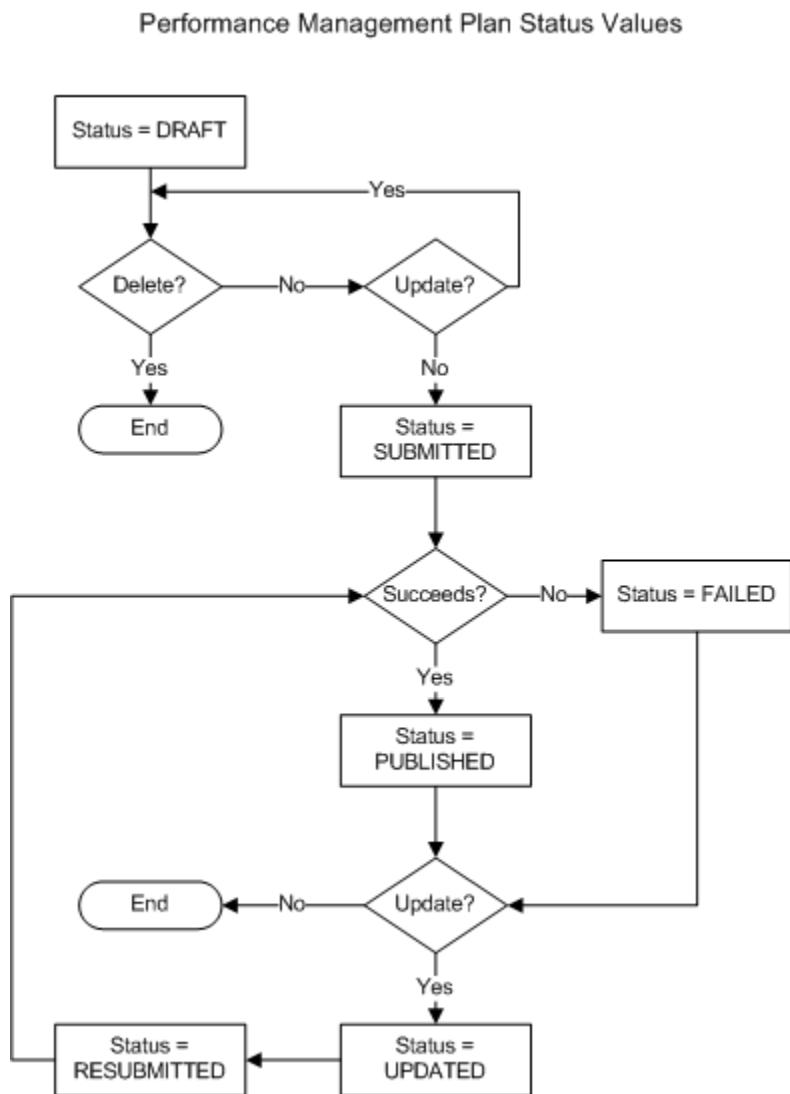
Draft

When you create a PMP, its status is Draft. You can update a plan in draft status as often as necessary. You can also delete a draft plan.

Submitted

When you first publish a draft plan, its status changes immediately to Submitted. A concurrent program performs the publication process, and the plan status remains Submitted until the program completes.

Published

When the publication process completes successfully, the plan status changes to Published. At this point, the plan takes effect. You cannot delete a published plan.

Failed

When the publication process is unsuccessful, the plan status is Failed. After updating the plan to correct any errors, you can submit it for publication again. However, you cannot delete a plan in Failed status.

Updated

If you update a published or failed plan, its status changes to Updated. The status remains Updated until you publish the plan again.

Resubmitted

When you publish an updated plan, its status changes to Resubmitted. When the republication process completes, the plan status changes to Published.

Transferred from Plan

When the plan administrator republishes a performance management plan, the application does not delete appraisals and scorecards of workers if they are no longer part of the published plan population, for example, because of termination or transfer to another plan. The application changes the status of these appraisals and scorecards to *Transferred from Plan*. This status is displayed for all scorecards and appraisals of workers who are either terminated or transferred from the published plans. You can view the scorecards and appraisals with the Transferred from Plan status on the Monitor Plan page using the HR Professional or HRMS Manager responsibilities. You cannot view or access the scorecards or appraisals with Transferred from Plan status using Employee or Manager Self-Service responsibilities.

Using the Performance Management Plan Republishing Options

This topic provides information on using the Update: Plan Review page when you update and republish a plan.

Viewing General Plan Details

View plan details such as the plan name, plan administrator, and start and end dates of the plan.

Selecting the Republish Options

Select any one of the republish options, combination of options, or all of the following options when you update and republish a plan:

- **Reallocate Objectives**

  This option replaces allocated objectives that are updated in the scorecards with original objectives from the Objectives Library. The application includes additional objectives, if any, into the scorecards.

  > **Note:** If you select the Reallocate Objectives option, then based on your requirements, you must select the Include Objective Setting in Process and Automatic Allocation check boxes or the Automatic Allocation check box.
  >
  > If you are updating a plan that includes only appraisals, then you cannot select the Reallocate Objectives option.

  Workers receive FYI notifications about reallocation of objectives from the Objectives Library.

- **Reevaluate Plan Population**

  This option evaluates whether plan members are eligible to be part of the plan population based on HR changes such as new hires, transfers, and termination. The application rebuilds supervisor hierarchy based on any HR changes so that the Performance Management Plan Appraisal Rating Summary displays information based on the changes made in the supervisor hierarchy. New workers who are eligible to be part of the plan populations are enrolled in the plan.

  > **Note:** When a worker is enrolled into a plan after the objective setting period, no objectives are added to the scorecard.

  If you republish a plan using this option, the process does not remove existing plan members who are found ineligible when the plan is updated and republished. To

remove plan members who are not eligible, you must use the Remove Scorecards task that is available in the Performance Management Plan Administration Home Page. See: Performance-Management Plan Administration Tasks, page 1-142

New workers who are enrolled in the plan receive FYI notifications.

- **Refresh Scorecards**

  This option refreshes scorecards based on changes in the objective eligibility and includes additional objectives, if any, into the scorecards.

  > **Note:** If you select the Refresh Scorecards option, then based on your requirements, you must select the Include Objective Setting in Process and Automatic Allocation check boxes or the Automatic Allocation check box.

  Managers and workers receive FYI notifications when scorecards are refreshed.

- **Reset Scorecard Status**

  This option resets the status of all personal scorecards to With Worker or With Manager when the plan is republished, to enable worker or manager to resume objective setting.

  Managers and workers receive FYI notifications when the status of scorecards is reset.

Republishing Rules

- If you republish a plan, after the objective setting date, then the application does not add new eligible objectives to the workers' scorecards.

Impact of the Republishing Options on PMP Tasks of Managers and Workers

The following table explains the impact of each of the republish options on PMP tasks of managers and workers:

Republish Option	Impact of the Action
Reallocate Objectives	Original objectives from the Objectives Library appear in the scorecards of plan members.
	Scorecards will be with the relevant owners depending on the objective setting cycle phase. For a cascading plan, managers have to set objectives and cascade them to workers in their hierarchy.
Reevaluate Plan Population	New workers who are enrolled in the plan receive FYI notifications. The PMP with its tasks list appears on the home page of newly enrolled workers.
	Workers who become ineligible because of transfer or termination are marked as Transferred Out.
	Workers who are no longer part of the plan population cannot view the plan on their home page.
Refresh Scorecards	Objectives are added to the worker's scorecard based on the plan eligibility criteria.
Reset Scorecard Status	The application resets the status of all personal scorecards to either With Worker or With Manager when you republish the plan so that all plan members can resume objective setting.

Viewing Manager and Worker Tasks

The Update Plan: Review page shows the tasks Performance Management will generate for workers and managers when you republish the plan. You can view the manager and worker tasks with start and end dates for each of the tasks. The tasks depend on the plan type: whether the plan includes objective setting alone, appraisals alone or both objective setting and appraisals.

Performance Management Plan Administration Notifications

This topic lists the performance management plan administration notifications.

The following notifications are delivered in the HR WPM Plan (hrwpm.wft) workflow

process.

Mass Notification

The following notification is sent when the plan administrator runs the Mass Notification program from the Performance Management page.

Message Name	Message Internal Name	Description
Mass Notification Message	MASS_NTF_GENERIC_NTF_MESSAGE	Used in the Mass Notification process

Notifications Related to the Performance Management Plan (PMP Administration Tasks

HR Professionals or plan administrators can perform tasks using the Performance Management Plan Administration Home Page. See: Performance Management Plan Administration Tasks, page 1-142

The following table lists the notifications for PMP administration tasks

Message Name	Message Internal Name	Description
Enroll Workers to plan message for Manager	WPM_AP_ENROLL_MSG	Manager receives this FYI notification when workers are enrolled in a plan.
Refresh Scorecard Notification to Manager	WPM_SC_REFRESH_MGR	Manager receives this FYI notification when a worker's scorecard is refreshed.
Refresh Scorecard Notification for worker	WPM_SC_REFRESH_WKR	Worker receives this FYI notification when scorecard is refreshed.
Reopen Appraisal notification for manager	WPM_APPRAISAL_REOPEN_MGR_MSG	Manager receives this FYI notification when a worker's appraisal is reopened.
Remove Worker Score Cards.	WPM_SC_REMOVE_MSG	Worker receives this FYI message if the worker is unenrolled from the plan and can no longer access plan from the Performance Management home page.

Message Name	Message Internal Name	Description
Reopen Score Card Notification for worker	WPM_SC_REOPEN_WKR_MSG	Worker receives this FYI notification when the worker's scorecard is reopened.
Reopen ScoreCard Notification for Manager	WPM_SC_REOPEN_MGR_MSG	Manager receives this FYI notification when a worker's scorecard is reopened. The status of the scorecard changes to With Manager and is available for the manager to edit.
Extend Objective Setting Deadline for Worker	WPM_SC_EXTND_DEADLINE_WKR	Worker receives this FYI notification when the objective setting deadline date is extended.
Extend Objective Setting Deadline for Manager	WPM_SC_EXTND_DEADLINE_MGR	Manager receives this FYI notification when the objective setting deadline date of worker is extended.
Transfer Scorecard with Objectives and Appraisal for Manager	WPM_SC_TRNF_WITH_APPR_MGR	Manager receives this FYI notification when a worker's both scorecard and appraisal of the source plan are transferred to the destination plan.
Transfer Scorecard with Objectives and Appraisal for worker	WPM_SC_TRNF_WITH_APPR_WKR	Worker receives this FYI notification when the scorecard and appraisal of the source plan is transferred to the destination plan.
Transfer Scorecard with Objectives for Manager	WPM_SC_TRNF_WITH_OBJ_MGR	Manager receives this FYI notification when a worker's scorecard of previous plan is transferred to the destination plan.

Message Name	Message Internal Name	Description
Transfer Scorecard with Objectives for worker	WPM_SC_TRNF_WITH_OBJ _WKR	Worker receives this FYI notification when the scorecard of the source plan is transferred to the destination plan.
Transfer Worker only for Manager	WPM_SC_TRNF_ONLY_MG R	Manager receives this FYI notification when a worker is unenrolled from the source plan and enrolled in the destination plan.
Transfer Worker only for worker	WPM_SC_TRNF_ONLY_WK R	Worker receives this FYI notification when the worker is unenrolled from the source plan and enrolled in the destination plan.

Notifications for Republish Options

HR Professionals or plan administrators can select a specific republish option, a combination of options, or all of the republish options when they update and republish plans.

For more information, see: Using the Performance Management Plan Republishing Options, page 1-86

The following table lists the notifications that are sent when republish options are used:

Message Name	Message Internal Name	Description
Refresh Scorecard Notification to Manager	WPM_SC_REFRESH_MGR	Manager receives this FYI notification when a worker's scorecard is refreshed.
Refresh Scorecard Notification for worker	WPM_SC_REFRESH_WKR	Worker receives this FYI notification when the worker's scorecard is refreshed.

Message Name	Message Internal Name	Description
Reallocate Objectives from Library for worker	WPM_SC_REALLOCATE_OBJ_WKR	Worker receives this FYI notification when the allocated objectives in the worker's scorecard are replaced by objectives from the Objectives Library.
Enroll Workers to plan message for Manager	WPM_AP_ENROLL_MSG	Manager receives this FYI notification when workers are enrolled in a plan.

Monitoring and Rolling Back Performance Management Plans

When HR Professionals search for performance management plans, they can monitor the plans and roll back plans, if required.

Monitoring Plans

On the Monitor Plans page, you can monitor plans to view scorecard and appraisal details.

Scorecard Summary

View scorecard summary of plans at different statuses such as Published, Not Yet Started With Worker, and Not Yet Started With Manager. You can search for scorecards using criteria such as organization, position, and job and select the status for which you want to view the scorecard summary. You can view details of scorecards such as scorecard owner, status, and assignment details. If you do not select a status, then the application displays scorecards of all statuses.

Appraisal summary

View appraisal summary of plans at different statuses such as Published, Not Yet Started With Worker, and Not Yet Started With Manager. If a plan has more than one appraisal period, then select the appraisal period for which you want to view the details. You use criteria such as organization, position, and job and select the status for which you want to view the appraisal summary. If you do not select a status, then the application displays appraisal summary of all statuses.

Rolling Back Performance Management Plans

You can roll back plans from the Performance Management Plans page. You may accidentally publish a plan with incorrect dates or details, or to the wrong population. You can take a corrective action by rolling back such a plan. You can roll back plans that

are at any status except at the *Draft* status. However, you cannot roll back completed plans.

Rolling back a plan is an irreversible action. When you click the Roll Back icon for a performance management plan, the application displays the Monitor Plan page with a warning message.

> **Note:** You must monitor the scorecard and appraisals details before you choose to roll back a plan.

When you roll back a plan, the application removes all the transactional data related to the plan including scorecards, objectives, appraisals, and sets the plan status to the Draft status. A notification is sent to all members of the plan population when the performance management plan is rolled back.

Viewing Performance Management Plan Appraisal Rating Summary

The Performance Management Plan Appraisal Rating Summary provides managers information on progress of appraisals in their hierarchy.

Using the Performance Management Plan Appraisal Rating Summary, HR professionals and managers can:

- View appraisal rating distribution in their reporting line

- View and compare appraisal ratings in a hierarchy

- Track progress of appraisals

- Drill down to appraisal details

> **Note:** The Performance Management Plan Appraisal Rating Summary report supports a maximum of 20 rating levels.

Prerequisites

To view the latest appraisal rating summary for any plan, the performance management plan must be published. The HR administrator must run the Refresh Appraisal Summary concurrent program after managers rate the appraisals. This concurrent program populates the latest ratings in the Appraisal Summary table. For more information, see: Running the Refresh Appraisal Summary Program, page 1-101

If you want the Performance Management Plan Appraisal Rating Summary to display information based on HR changes such as new hires, transfers, and terminations, then your plan administration must use the Reevaluate Plan Population republish option and republish a plan. This option rebuilds supervisor hierarchy based on HR changes, if any, so that the Performance Management Plan Appraisal Rating Summary displays information based on the changes made in the supervisor hierarchy. See: Using the

Appraisal Summary

Select a plan and a corresponding appraisal period (if the plan includes more than one appraisal period), to view the rating distribution of the appraisals in your hierarchy.

Managers can view the summary of appraisals of their direct reports and indirect reports in their reporting line. The Appraisal Summary displays the name of each of your direct reports, along with the levels defined for the rating scale, and the Not Appraised and Total columns.

When you log in as a manager, you can:

*   View the appraisal summary of your direct reports who report to you.

*   View the appraisal summary of your indirect reports (workers reporting to your direct reports) by clicking the Total column of the direct reports. When you click the Total column, a drill-down page appears that displays the details of the appraisals such as the Appraisal template, Appraisee, Main Appraiser, Appraisal Date, and Appraisal Period.

    The last row displays the total number of workers for each rating level. The individual column totals in the last row sum up to the total number of workers in the hierarchy.

The number in each of the rating level columns represents the number of workers who have obtained the same overall rating. The Not Appraised column displays the total number of appraisals that are not given an Overall Rating.

The following section explains the information that the Appraisal Summary table displays using Sam Taylor's hierarchy as an example.

Sam Taylor's Hierarchy
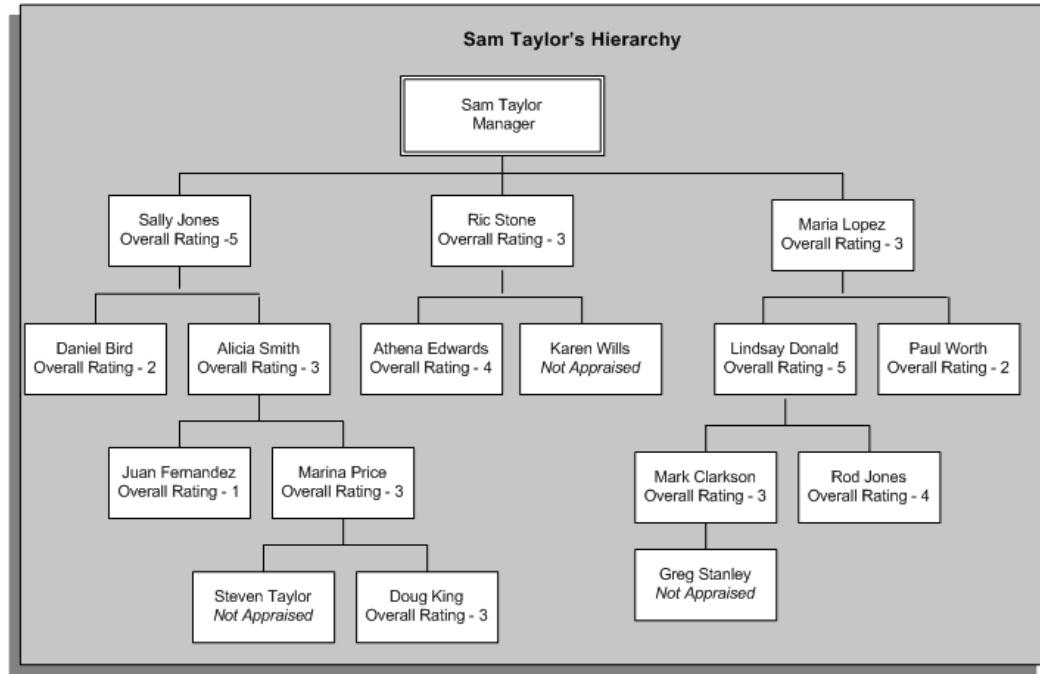
This example uses the following rating scales:

- 1: Indicates that the performance is significantly below the required level.

- 2: Indicates that the performance is below the job requirement.

- 3: Indicates that the performance is good.

- 4: Indicates that the performance exceeds required level.

- 5: Indicates that the performance is exceptional.

The Appraisal Summary table for Sam displays the name of each manager along with the levels defined for the rating scale. Sam can view the ratings of all workers in his hierarchy. The table also displays the number of workers not appraised and total number of workers reporting to his directs.

Appraisal Summary

Manager	Overall Rating 1	Overall Rating 2	Overall Rating 3	Overall Rating 4	Overall Rating 5	Not Appraised	Total
Sam Taylor	0	0	2	0	1	0	3

Manager	Overall Rating 1	Overall Rating 2	Overall Rating 3	Overall Rating 4	Overall Rating 5	Not Appraised	Total
Sally Jones	1	1	3	0	0	1	6
Ric Stone	0	0	0	1	0	1	2
Maria Lopez	0	1	1	1	1	1	5
Total	1	2	6	2	2	3	16

To view appraisal summary of workers who report to Sally, Ric, or Maria, Sam must click the number in the Total column of his direct reports. In this example, the rating columns, not appraised and total columns include workers in the direct reports' hierarchy. The summary for Sally Jones includes information of her directs' Daniel Bird and Alicia Smith and their direct and indirect reports.

> **Note:** The data that the Appraisal Rating Summary displays is based on the effective date when the Refresh Appraisal Summary concurrent program is run.

Rating Distribution Percentage

You can view a graphical representation of the rating summary, which is represented by a pie chart. The pie chart shows the percentage distribution of workers for different rating levels. The application calculates rating distribution percentage as:

(Total number of appraisals for a rating) / (Total number of appraisals) * 100

For example, the application calculates the rating distribution percentage in Sam's hierarchy as:

- Percentage distribution for Overall Rating 1 = 1/16 * 100: 6.25%

- Percentage distribution for Overall Rating 2 = 2/16 * 100: 12.5%

- Percentage distribution for Overall Rating 3 = 6/16 * 100: 37.5%

- Percentage distribution for Overall Rating 4 = 2/16 * 100: 12.5%

- Percentage distribution for Overall Rating 5 = 2/16 *100: 12.5%

- Percentage distribution for Not Appraised = 3/16 * 100: 18.75%

Rating Distribution by Manager

You can view a graphical representation for rating by manager, which is represented by a bar graph. The bar graph shows the number of workers for each rating level for a particular manager.

For example, in Sam's hierarchy, the Rating Distribution by Manager for Ric displays a bar graph for the overall rating 4 for one of his workers (Athena) and another bar graph for Not Appraised (Karen Wills).

Running the Publish Performance Management Plan Program

A Performance Management Plan has no effect until you publish it. When you publish the plan, the process automatically generates personal scorecards for all plan members and a list of tasks to guide plan members through the performance-management process.

See: Personal Scorecards, page 1-122

See: Manager Performance-Management Tasks, page 1-126 and Worker Performance-Management Tasks, page 1-138

You can publish PMPs from the Performance Management Plans page as well as using the Submit Request window. Typically, when you publish the plan for the first time, you publish from the Performance Management Plans page. After you publish a PMP, you can republish it, for example, to include new hires into the PMP. You can schedule this program to run automatically based on your enterprise requirements to update the plan population periodically.

> **Note:** During the plan publish process, the application evaluates population eligibility and creates scorecards for eligible workers only. If a worker becomes ineligible after the scorecard is created, then the application does not remove the scorecard that is already created for the worker when the plan is republished.

To run the Publish Performance Management Plan program:

1. In the Name field, select Publish Performance Management Plan.

   The Parameters window opens.

2. In the Effective Date field, enter the date on which the application is to publish the plan.

3. Select the plan that you want to publish.

4. The Reverse parameter is no longer supported. You can roll back performance management plans.

   See: Monitoring and Rolling Back Published Plans, page 1-92

5. The What if parameter is no longer supported.

6. In the Log Output field, select Yes to create a debug log file of the Publish Performance Management Plan program.

7. In the Action parameter group field, set the maximum errors value allowed for the process. This is defined using the Payroll Action Groups window.

   See: Setting Up Workforce Performance Management, page 1-68

8. In the Workflow Item type field, if you are using a custom workflow item type, then enter that value. Otherwise, the program uses the predefined HRWPM workflow item type.

9. Enter the workflow process that the application must use to notify the plan population. The default workflow process is HR_NOTIFY_WPM_PLAN_POP_PRC.

10. Click OK, and then Submit.

What's Next

When you republish a performance management plan, the application does not delete appraisals and scorecards of workers if they are no longer part of the published plan population, for example, because of termination or transfer to another plan. The application changes the status of these appraisals and scorecards to *Transferred from Plan*. This status is displayed for all scorecards and appraisals of workers who are either terminated or transferred from the published plans. You can view the scorecards and appraisals with the Transferred from Plan status on the Monitor Plan page using the HR Professional or HRMS Manager responsibilities. You cannot view or access the scorecards or appraisals with Transferred from Plan status using Employee or Manager Self-Service responsibilities.

Using the Transfer Objectives option on the Performance Management Plan Administration Home Page, you can copy objectives and competencies from a worker's source plan to the worker's new plan or destination plan. You can use this option for workers who cannot access objectives or appraisals of the source plan as they are no longer part of the source plan population because of transfer. For information on the details that are copied from the source plan to the destination plan and the tasks for the supervisor of the destination plan see: Performance-Management Plan Administration Tasks, page 1-147

Running the Mass Appraisal Creation Program

Performance Management can automatically create appraisals for all members of a Performance Management Plan (PMP) on the date specified in the plan. You can create appraisals for new hires and employees who have transferred-in to your organization and are part of the performance-management plan population, even if their employment start date is later than the appraisal task start date. When you run the Mass Appraisal Creation program to republish the performance management plan, the process creates appraisals for new joinees and transfers-in.

Alternatively, you can run the appraisal-creation process independently of the PMP.

As an HR Professional, you can run this program from the Batch Requests region of the Performance Management page.

See: HR Professional Performance Management Tasks, page 1-131

To run the Mass Appraisal Creation program:

1. In the Name field, select Mass Appraisal Creation.

   The Parameters window opens.

2. In the Effective Date field, enter the date on which the application is to create appraisals.

3. In the Performance Plan field, select the plan for which you are creating appraisals.

4. In the Appraisal Template field, select the relevant appraisal template. If the plan includes only one combination of appraisal template and appraisal period, the appraisal template name appears here automatically.

5. In the Log Output field, select Yes to create a log file of the appraisal-creation process.

6. Setting the Delete Pending Transactions parameter:

   The default value of this parameter is No. If this parameter is set to No, the application prevents the creation of scorecards by deleting all the pending transactions when the Mass Appraisal Creation program is scheduled to run automatically. If any pending transactions exist, then the Mass Appraisal Creation program does not run and the application displays the following error: 'The Mass Appraisal Creation process has failed because pending transactions exist for this performance management plan'.

   If required, to meet certain business requirements, HR administrators can set this parameter to Yes, in which case the application deletes all the pending transactions prior to the running of the Mass Appraisal Creation program. For example, a Performance Management Plan is published to a population of 20,000 employees. If

objective setting has not been completed for about 100 employees, then HR administrators can choose to set this parameter to 'Yes' and run the Mass Appraisal Creation program.

What's Next

The program creates appraisals for all plan members and allocates them to the initiator identified in the PMP.

The Mass Appraisal Creation process checks for workers in the plan population who have future dated termination. If the Allow Updates to Appraisals of Workers Terminated at a Future Date check box is selected for an appraisal template, then the program creates appraisals for workers whose termination date is set at a future date. Otherwise, the program does not create appraisals for such workers and their immediate direct reports. For more information, see: Enabling Update of Appraisals of Workers with Future-Dated Termination, page 1-190

You can view the Error Report on the Monitor Concurrent Program page. For information, see: Monitoring Reports and Processes, page 1-136

Running the Mass Notifications Program

Performance Management Plan (PMP) administrators can send notifications to all members of a plan or to a specific set of the plan population using the Run Mass Notification link on the Performance Management page. As a plan administrator, when you click the link, the Schedule Request: Parameter page appears.

Prerequisite: You can send a predefined message or custom message. To send a custom message, plan administrators must create the message using the Messages window. For more information, see: Setting Up Workforce Performance Management, page 1-68

To run the Mass Notification program:

1. Select the plan and enter the effective date.

2. Enter the appropriate message subject.

3. Select the message that you want to send to the plan members. You can select either a predefined message or custom message.

4. Select the target population to send the notification.

   Depending on your requirement and the notification subject, you can select a specific set of target population from a wide range that Performance Management offers. For example, you can select:

   • All active workers who have been transferred out of a published plan

- All approvers from whom feedback or approval is awaited

- Managers who have completed objective setting for their workers

- All appraisal participants such as appraisers, reviewers, and other participants who have not completed their appraisal feedback

5. Select the worker if you want to send the notification to a specific person.

6. Click Continue and review the details.

7. Click Submit.

   Plan administrators can monitor the program on the Monitor Concurrent Programs page. The program sends notifications to the relevant recipients and recipients can view notifications on their Performance Management home page.

Running the Refresh Appraisal Summary Program

The Refresh Appraisal Summary program updates the performance management plan appraisal data. This process enables managers to view the most up-to-date information on the Performance Management Plan Appraisal Rating Summary. For more information, see: Viewing Performance Management Plan Appraisal Rating Summary, page 1-93

You can run this program from the Performance Management Plan Administration page. This program is also available from the Submit Request window.

You can schedule this process to run based on the appraisal cycle in your enterprise. Alternatively, you can run this program, whenever workforce complete their appraisals.

To run the Refresh Appraisal Summary program:

1. In the Name field, select Refresh Appraisal Summary.

   The Parameters window opens.

2. In the Plan Name field, select the plan for which the application must refresh appraisal summary data for reporting purposes.

   > **Note:** This process does not update any information related to appraisals, rather populates the rating summary information for managers in a separate summary table.

3. In the Appraisal Period field, if a performance management plan has multiple appraisals, select the specific appraisal period to view the corresponding appraisal summary.

If the plan includes only one appraisal period, then the appraisal period appears here automatically.

4. Click OK, and then Submit.

What's Next

To monitor the process, click the Process Monitor and Reports link on the Performance Management Home page for HR Professionals and navigate to the Monitor Concurrent Programs page.

Objectives

The Objectives Library

The Objectives Library is a collection of reusable objectives that you create and maintain using the Objectives Library function. This function enables you to manage the enterprise objective-setting process efficiently. For example, you can:

- Define objectives consistently.

- Control the availability of objectives by specifying validity dates.

- Group objectives into locally defined categories for ease of retrieval.

- Establish naming standards for objectives.

- Allocate objectives automatically to eligible workers by means of the Performance Management Plan.

HR Professionals can define reusable objectives in the Objectives Library. Managers and workers can copy objectives from the Objectives Library to workers' personal scorecards of objectives. Managers and workers can search the library for objectives to include in personal scorecards.

Creating and Updating Objectives

Using the Objectives Library function, you can create objectives to include in the library. You can identify objectives in the library for automatic allocation to eligible workers.

See: Creating Objectives, page 1-104

Some values that you define for objectives in the library, such as the target completion date and the weighting value, are default values only. Workers and managers can update such values when the objective appears in a worker's personal scorecard.

See: Updating Objectives, page 1-107

Duplicating Objectives

You can make a copy of an objective already in the library to provide multiple versions of the same objective, perhaps with different validity dates or measures. However, for any objective in the library, the combination of name and validity dates must be unique. The application does not duplicate objective attachments.

Deleting Objectives

You can delete an objective from the objectives library, even if Performance Management has allocated the objective automatically to eligible workers. The deletion has no effect on the objective's inclusion in existing personal scorecards.

Importing Objectives

Instead of creating objectives individually, you can import them to the Objectives Library from a spreadsheet using Oracle Web ADI. This function enables you to import objectives definitions from other performance-management processes, for example. You can also update such objectives as a group (for example, you can set all validity dates at once) before uploading them to the application.

Copying Objectives

- *Copying objectives for a PMP appraisal*: You can select any one of these copy options, when you set objectives for a performance management plan appraisal or complete the objective-setting tasks only:

    - Objectives Library: Use this option to copy objectives from the Objectives Library.

    - Previous Objectives: Use this option to copy incomplete objectives that do not have an achievement date, from previous scorecards.

    - Shared Objectives: Use this option to copy shared objectives.

    See: Manager Performance-Management Tasks, page 1-126

    See: Worker Performance-Management Tasks, page 1-138

- *Copying objectives for an appraisal created using the Appraisal function*: When you set objectives for an appraisal created using the Appraisal function, you can copy previous objectives that are incomplete. When you select the Previous Objectives option, the application copies incomplete objectives that do not have an achievement date, from previous scorecards.

Creating Objectives

Performance Management supports the following ways of creating objectives:

- HR Professionals can define reusable objectives in the Objectives Library.

- Managers can define individual objectives for workers.

- Workers can define individual objectives for themselves.

Creating Objectives in the Objectives Library

To create objectives in the Objectives Library, you use the Objectives Library function. When you define the objective, you can specify the following values:

Value	Description
Validity Dates	Outside these dates, you cannot allocate the objective to a worker. You can use these dates to tie an objective to a particular performance-management period (for example, a calendar year). You must specify validity dates if you intend to allocate the objective to workers automatically. If you specify no Valid To date, the objective is available until you delete it.
Next Review Date	You can trigger alerts using this date to remind workers and managers that an objective needs review. This date is a default value that you can change for individual workers.
Target Date	Workers must achieve the objective by this date. This date is a default value that you can change for individual workers.
Group	You can use this value to group objectives into types (for example, Communication, Management, and Team Leading). Users can search the Objectives Library for objectives in a particular group.
Priority	You can assign a relative priority to an objective (for example, low, medium, or high). Users can specify a priority value when searching the Objectives Library.
Include in Appraisals	If you select this value and Performance Management creates appraisals automatically, the objective appears by default in the Objectives section of the appraisal of any worker who has the objective. You can update this selection for individual workers.

Value	Description
Weighting	The weighting value is an integer from a locally defined scale (for example, 1 through 5). It specifies the importance of this objective to the enterprise relative to other objectives. The application uses this value when calculating objective scores during appraisals. You can update this value for individual workers.

For information about the Measurement tab, see Measuring Objectives, page 1-108.

For information about the Eligibility tab, see Allocating Objectives to Workers Automatically, page 1-115

You can identify attachments for objectives. Note that, if you duplicate an objective, the application does not duplicate the objective's attachments.

Publish to Catalog Feature

If the Publish to Catalog column is available, then when you add attachments to an objective, and use the Publish to Catalog feature, the attachments are available globally in Oracle E-Business Suite of applications. Attachments that are published to catalog are available to other users if:

- The Attachments feature is enabled on Oracle Applications pages.

- The Search from Catalog option is enabled on the Oracle Applications pages.

Therefore, you must exercise caution when you use the Publish to Catalog feature.

Creating Individual Objectives

If you are a manager, you create individual objectives for workers using the Cascade or Set Objectives task. If you are a worker, you create individual objectives for yourself using the Set Objectives task. Managers and workers can also create individual objectives in the Objectives section of the appraisal.

The definition of an individual objective is the same as the definition of an objective in the Objectives Library, except that an individual objective:

- Is for one worker only

  You cannot store individual objective definitions in the Objectives Library.

- Does not have validity dates

  Its validity is that of the personal scorecard to which you add the objective.

- Has the following tracking values:

  - Start Date

    This is the date from which the worker owns the objective.

  - Complete %

    The worker or manager enters a percentage-complete value to record progress. The Complete % value need not be 100 on the achievement date. The value can be greater than 100 or less than 100 to indicate a measure of achievement. For example, a manager can enter 40% to indicate achievement below expectations or 120% to indicate achievement above expected performance.

  - Achievement Date

    The worker or manager enters the date when the objective Complete % is achieved.

    The application considers an objective as incomplete objective if the Complete % is less than 100 and the Achievement Date field is blank. When you select the Previous Objectives option while copying objectives, the application includes such incomplete objectives in the next scorecard.

  - Actual (for quantitative measures)

    The worker or manager completes this field for objectives with target values.

  - Verified (for qualitative measures)

    The manager selects this option to confirm that an objective is complete.

  These values are disabled when you create the objective. They are enabled from the worker and manager View and Track Objective Progress tasks.

  See Tracking Objectives, page 1-120

Updating Objectives

You can update both individual objectives and objectives in the Objectives Library.

Updating Objectives in the Objectives Library

You can update objectives in the Objectives Library at any time, regardless of whether the application has allocated them to workers automatically. Changes that you make to objectives in the Objectives Library do not affect objectives already copied to personal scorecards, as there is no link between the two versions of the objective.

For example, if you change the validity dates of an objective in the Objectives Library, the validity dates of the same objective in existing personal scorecards are unaffected. Similarly, if you delete an objective from the Objectives Library or change its eligibility

criteria, it remains in existing personal scorecards.

Creating New Objectives in the Objectives Library

If you create a new objective with eligibility criteria in the Objectives Library after publishing your Performance Management Plan (PMP), the application allocates the objective automatically to eligible workers if you republish the PMP.

Updating Individual Objectives

Individual objectives are outside the Objectives Library and apply to individual workers. During an objective-setting period, you can update these objectives freely. Outside objective-setting periods, you can update individual objectives only if permitted. (The HR Professional must select Allow Changes Outside This Period in the PMP to allow you to update objectives outside objective-setting periods.) In this case, objective-setting tasks in worker and manager task lists remain enabled outside objective-setting periods.

Updating Tracking Information

Tracking information (such as Complete % and Achievement Date) is not part of an objective's definition. You can update tracking information throughout the performance-management period.

See: Tracking Objectives, page 1-120

Measuring Objectives

When you define an objective, you can identify a measurement style. This value enables you to judge whether a worker has achieved an objective.

Performance Management defines two measurement styles for objectives: quantitative and qualitative.

Quantitative Measurement

You select a quantitative measurement style for objectives with outcomes that you can measure in numerical terms. For these objectives, you specify a target value, a unit of measure (UOM), and a type. To set precise targets for objectives, you can enter decimal values in the Target and Actual value fields. You can provide decimal values for the number, percentage, and currency unit of measurements.

These example objectives have quantitative measurement styles:

Objective	Target	UOM	Type
Increase sales revenue	10	Percent	MIN
Reduce department costs	10,000	U.S. Dollars	MAX
Sell and install complete kitchens	30	Number	MIN

Qualitative Measurement

You select a qualitative measurement style for objectives with outcomes that you cannot assess in numerical terms. For example, objectives related to skill development or improvement of worker morale would require a qualitative measurement style. Achievement of this type of objective needs assessment and verification by a worker's manager, for example. For these objectives, managers can indicate, using the View and Track Objective Progress task, that they have verified achievement of the objective. These example objectives require a quantitative measurement style:

- Improve merchandise-display skills.

- Develop viable customer loyalty scheme.

- Manage successful merger of main and subsidiary procurement teams.

Tracking and Assessment of Objectives

Having defined a measurement style for an objective and allocated the objective to a worker, you can track the worker's progress throughout the performance-management period. For example, if a retail manager's objective is to train team members in merchandise display and the target value is 100 percent, after three months the actual value may be 15 percent, after six months 25 percent, after nine months 40 percent, and after 12 months 70 percent. The worker's manager can review progress at any time and take remedial action, if appropriate.

See: Tracking Objectives, page 1-120

During a worker's appraisal, appraisers can assess a worker's *performance* in the delivery of his or her objectives. Assessment is a separate activity from tracking, and while failure to achieve objectives may also indicate poor performance, the relationship is not fixed.

See: Assessing Competencies and Objectives, page 1-196

Cascading Objectives

The HR Professional identifies the population of a Performance Management Plan (PMP) by selecting part or all of a hierarchy structure. For example, all workers in an organization hierarchy or all workers in two levels of a five-level supervisor hierarchy could be the members of a particular PMP. The following figure shows an example supervisor hierarchy whose workers belong to the PMP Southern Area Sales 2008.

Southern Area Supervisor Hierarchy
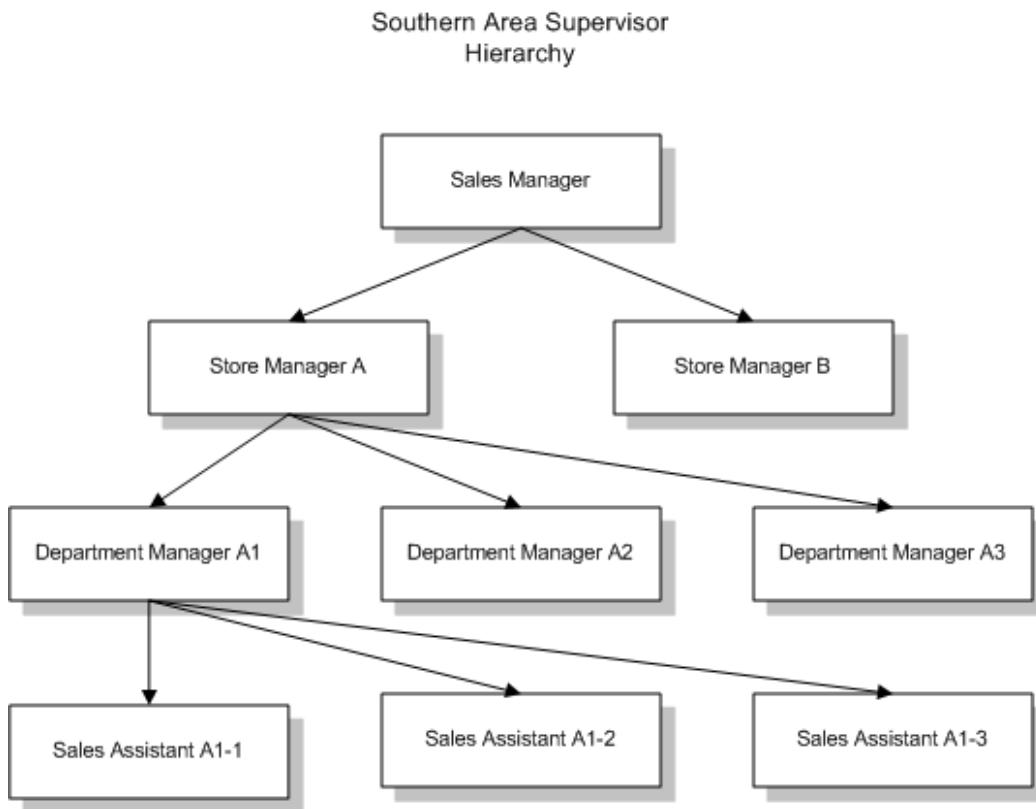
To allocate the enterprise objectives in some form to all enterprise workers, you can use the cascading-objectives process. The top manager in the plan hierarchy (the sales manager, in our example), prompted by the PMP task Cascade or Set Objectives, begins the process by setting his or her *own* objectives using Employee Self-Service. Typically, the manager bases these objectives on the enterprise objectives. In this example, the sales manager has the following objectives:

Objective	Target	Unit of Measure	Type
Increase sales revenue	500,000	USD	Minimum

Objective	Target	Unit of Measure	Type
Develop customer awareness	N/A	N/A	N/A

To cascade these objectives to the store managers, the sales manager can:

- Allocate them to the store managers and adjust the targets, if appropriate. For example, the sales manager can allocate the objective to increase sales revenue to both store managers. For store manager A, the target is 275,000.00 USD, and for store manager B, the target is 300,000.00 USD.

- Create new objectives for either or both store managers. For example, to cascade the objective to develop customer awareness, the sales manager can create the new objective Conduct Customer Survey for store manager A and Devise Customer Loyalty Scheme for store manager B.

The store managers repeat this process for their department managers, who repeat it in turn for their sales assistants. For example, store manager A can cascade the objective Conduct Customer Survey to the three department managers by defining three new objectives:

1. Devise customer questionnaire.

2. Plan customer reward event.

3. Conduct in-store poll.

Once the store manager has set these supporting objectives for the department managers, they can, in turn, cascade their objectives to the sales assistants who report to them.

The effect of the cascading process is to define a hierarchy of objectives, where each level comprises supporting objectives for the objectives at the next level.

The following figure shows the objectives hierarchy from our example:

Southern Area Sales
Objectives Hierarchy
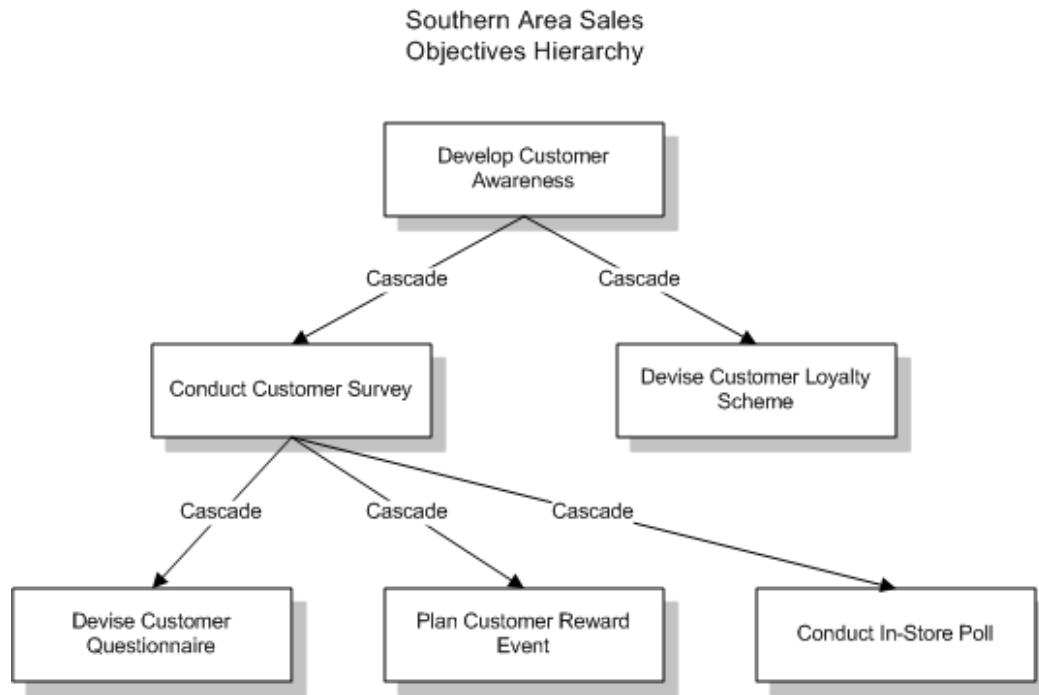
The supporting objectives are automatically aligned with the objectives above them in the hierarchy.

Note that, for each worker in the hierarchy, the cascading process is just one way of setting objectives. Managers can also set nonsupporting objectives for workers, and workers can set their own objectives. You can use all methods in a single PMP.

Task Flow in a Cascading Process

In the PMP, the HR Professional can select either cascading or parallel objective setting. In a cascading process, managers start objective setting; in a parallel process, workers start objective setting.

The following figure summarizes the flow of control between managers and workers in a cascading process. The process starts with the manager task Cascade or Set Objectives.
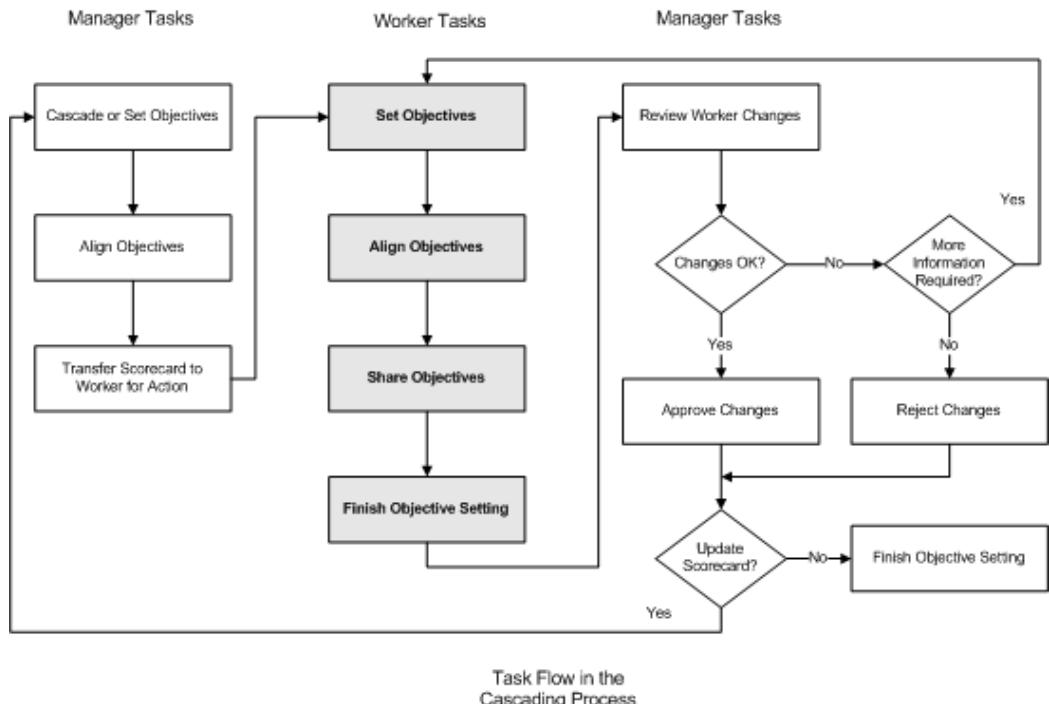
Manager Tasks   Worker Tasks   Manager Tasks

Task Flow in the
Cascading Process

For information about the tasks shown in this figure, see Manager
Performance-Management Tasks, page 1-126 and Worker Performance-Management
Tasks, page 1-138

For information about the parallel process, see Setting Objectives in Parallel, page 1-113

Setting Objectives in Parallel

If the HR Professional selects the parallel objective-setting process in the Performance
Management Plan (PMP), workers start the objective-setting process. By contrast, in the
cascading process, managers start the objective-setting process.

When the application generates personal scorecards, they contain objectives
automatically allocated to workers or copied from their previous appraisals or personal
scorecards. In the parallel process, workers, prompted by the PMP task Set Objectives,
update their personal scorecards before passing control of the scorecards to their
managers. The managers can then review their workers' personal scorecards before

making any additional changes.

Although the flow of control between managers and workers varies with the process (cascading or parallel), the tasks that managers and workers can perform are the same. For example, even when using the parallel objective-setting process, managers can still cascade objectives to workers. Similarly, when using the cascading process, managers do not have to cascade objectives to their workers.

Task Flow in a Parallel Process

The following figure summarizes the flow of control between managers and workers in a parallel objective-setting process. The process starts with the worker task Set Objectives.
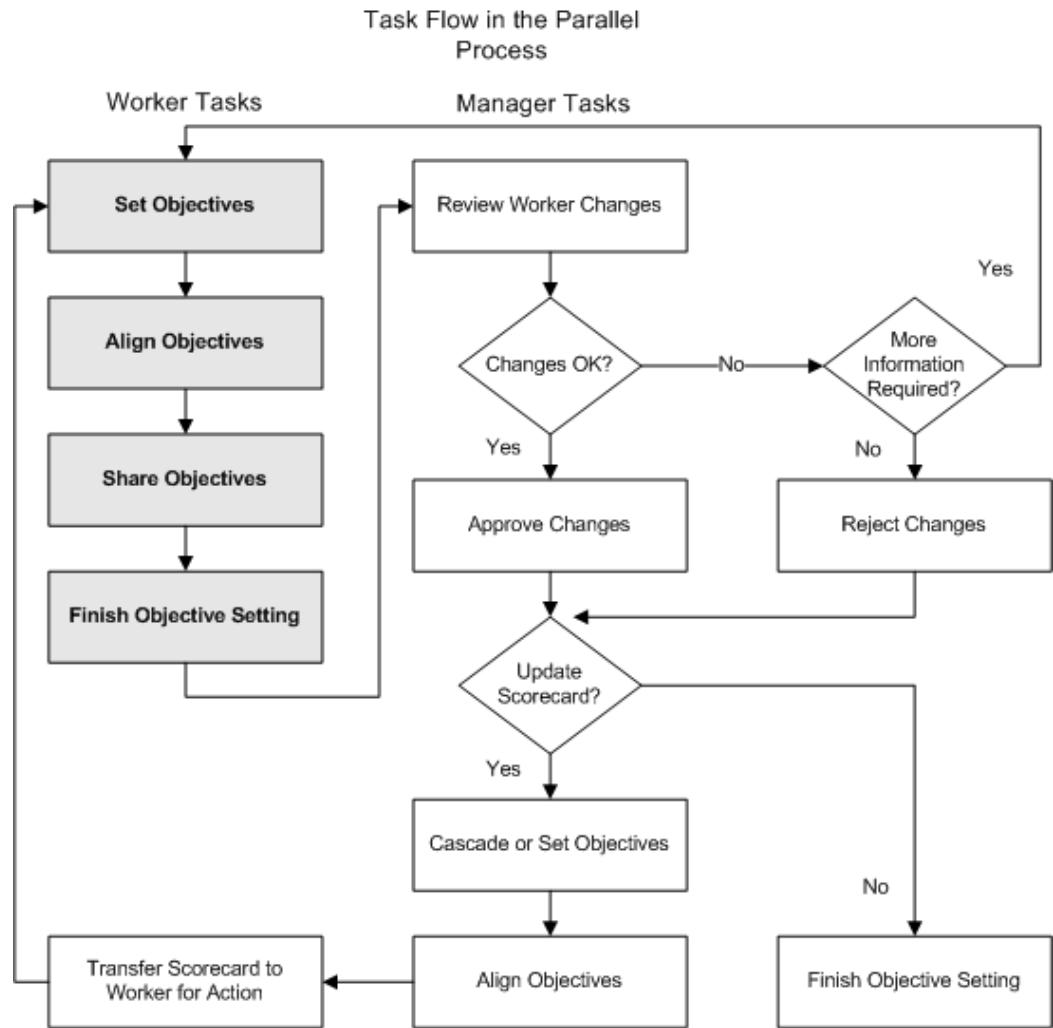
Task Flow in the Parallel Process

Worker Tasks

- Set Objectives
- Align Objectives
- Share Objectives
- Finish Objective Setting

Manager Tasks

- Review Worker Changes
  - Changes OK?
    - Yes → Approve Changes
    - No → More Information Required?
      - Yes → (back to Review Worker Changes)
      - No → Reject Changes
- Update Scorecard?
  - Yes → Cascade or Set Objectives → Align Objectives → Transfer Scorecard to Worker for Action
  - No → Finish Objective Setting

For information about the tasks shown in this figure, see Manager Performance-Management Tasks, page 1-126 and Worker Performance-Management Tasks, page 1-138

For information about the cascading process, see Cascading Objectives, page 1-110

Allocating Objectives to Workers Automatically

When you create an objective in the Objectives Library, you can specify who will receive the objective automatically by associating the objective with an eligibility profile. To create the eligibility profile, you use the Eligibility Profiles function.

When you publish a Performance Management Plan (PMP), members of the plan population automatically receive the objective in their personal scorecards if:

- They satisfy the objective's eligibility requirements.

- The objective's validity dates are the same as or wholly within the PMP dates.

Creating New Objectives After Plan Publication

In some circumstances, Performance Management can allocate objectives to eligible workers *after* you first publish a plan. That is, if you define an objective with eligibility criteria and the objective's dates are the same as or wholly within those of a published, ongoing plan, the application assesses the eligibility of the plan population for the new objective and automatically adds it to the personal scorecards of eligible workers if you republish the plan.

Allocating a Single Objective to Workers in Multiple Business Groups

If you have access to the Objectives Library function, you can:

- View *all* objectives in the Objectives Library.

- Use any existing eligibility profile, regardless of business group, in an objective definition in the Objectives Library.

As eligibility profiles are business-group specific, an eligibility profile you define in one business group is unavailable for use in other enterprise business groups. Therefore, when you associate an objective with an eligibility profile, you effectively restrict automatic allocation of that objective to a single business group.

To allocate an objective automatically to workers in multiple business groups, you create a version of the objective for each business group by duplicating the objective in the Objectives Library. In each version of the objective, identify an appropriate eligibility profile. Remember also to ensure that each combination of objective name and validity dates is unique in the Objectives Library. As you can see all objectives in the Objectives Library and all enterprise eligibility profiles, you can perform this task without switching responsibilities.

The following figure shows the relationship between business-group-specific eligibility profiles and objectives in the Objectives Library.

Objectives Library
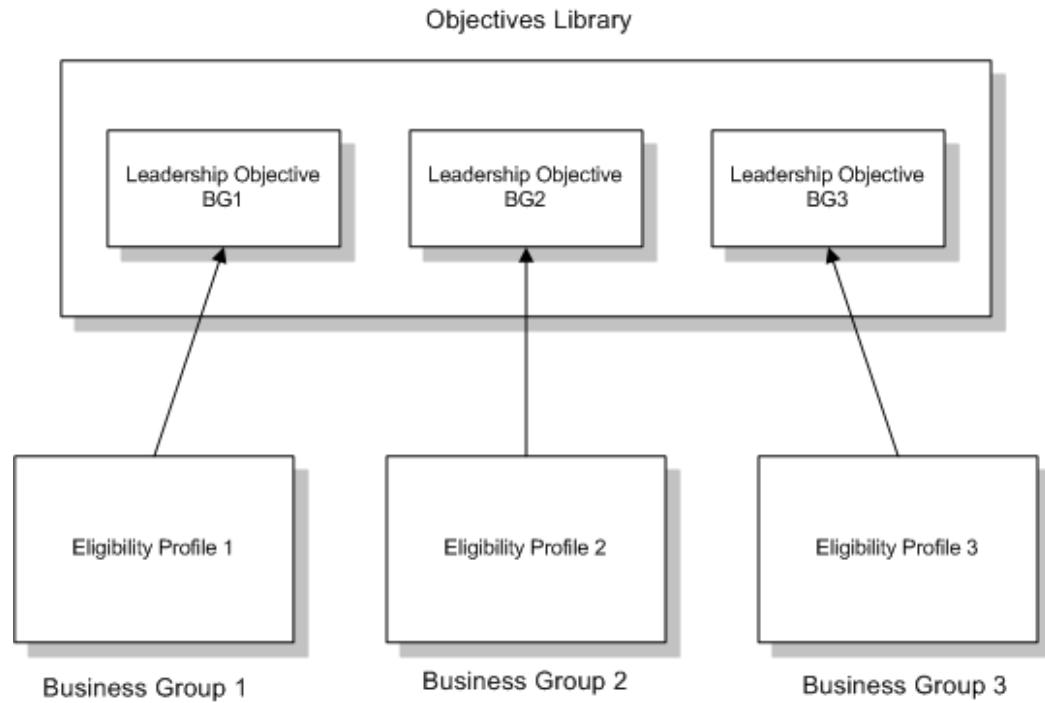
An Automatic-Allocation Example

Automatic allocation results for this objective appear in the following table:

- The objective name is Attend Retail Management Seminar Level 3.

- The objective validity dates are 01/01/2007 to 12/31/2007.

- Workers whose job title is department manager are eligible for this objective.

Employee	Job	PMP	Plan Start	Plan End	Receives Objective?
A	Department Manager	Performance Plan 2007	01/01/2007	12/31/2007	Yes
B	Supervisor	Performance Plan 2007	01/01/2007	12/31/2007	No
C	Department Manager	Objectives Plan 2006 - 2008	09/01/2006	03/31/2008	Yes

Employee	Job	PMP	Plan Start	Plan End	Receives Objective?
D	Department Manager	Objectives Plan 2006 - 2007	06/01/2006	05/31/2007	No

- Employee A receives this objective automatically because he is a department manager and the objective's validity dates are the same as those of the PMP to which he belongs.

- Employee B does not receive this objective because, even though she belongs to the same PMP as Employee A, she is not a department manager and therefore fails to meet the eligibility criteria.

- Employee C receives this objective automatically because he is a department manager and the objective's validity dates are wholly within those of the PMP to which he belongs.

- Employee D does not receive this objective because, although she is a department manager, the objective's validity dates are outside those of the PMP to which she belongs.

Sharing and Aligning Objectives

You can build hierarchies of objectives, with objectives at lower levels in the hierarchies supporting those immediately above them. Objectives at lower levels, known as *supporting objectives*, are said to be *aligned* with those objectives that they support. Supporting objectives:

- Can be identical to the objectives that they support, perhaps with different targets, or they can be completely different

- Do not have to have the same measurement style as the objectives that they support

Not all objectives need to belong to an objectives hierarchy. Typically, personal objectives remain outside hierarchies. You can delete objectives that belong to objectives hierarchies without causing errors.

The following figure shows objectives inside and outside a hierarchy:

Objectives Inside and Outside Hierarchies
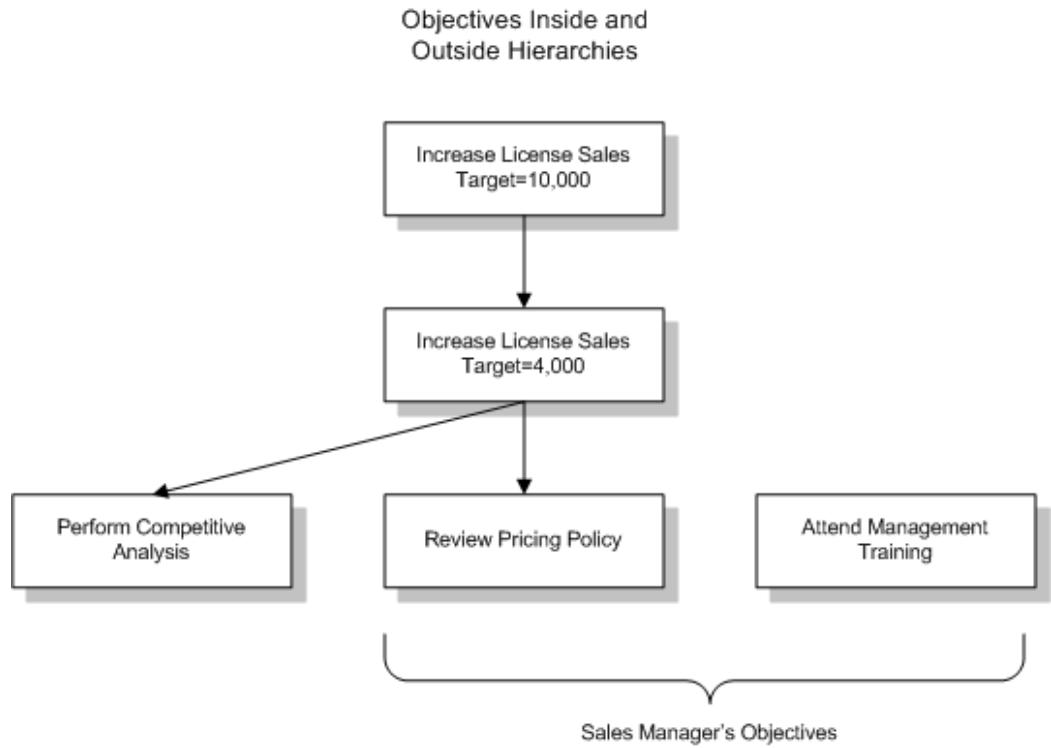
In this figure, the objectives at the first two levels of the hierarchy are identical; at the third level, objectives are different from the objective that they support. The sales manager has two objectives, but only one, Review Pricing Policy, aligned with Increase License Sales, belongs to an objectives hierarchy. The sales manager is unaware of the objective Perform Competitive Analysis.

Ways of Constructing an Objectives Hierarchy

When managers cascade objectives to workers who report to them, they create supporting objectives that are automatically aligned with the cascaded objective. Workers and managers can also create relationships between objectives manually. Before you can align an objective with a different objective:

- The HR Professional or manager must have enabled sharing and alignment in the Performance Management Plan (PMP).

- The objective's owner must have *shared* the objective with you and permitted alignment.

Sharing Your Objectives

You can share any of your objectives with other members of the PMP. If you allow others to view an objective, they can view its detail but not align their objectives with it. If you allow others both to view and to align, they can define supporting objectives for

the shared objective.

For example, if you share the objective Improve Supplier Relationships with four coworkers, each coworker can define a supporting objective and align it with your objective. You can view those supporting objectives only if security permissions give you access to your coworkers' personal scorecards.

Managers typically share objectives by cascading them, in which case sharing and alignment are automatic. Alternatively, managers can share objectives if they use Employee Self Service to perform the Share Objectives task.

Aligning Your Objectives

When you align an objective, you define a relationship between your objective and an objective that another member of the PMP has shared with you. The Align Objectives page, accessed from the Align Objectives task, displays a list of people who have shared objectives with you; you can view details of each shared objective. Note that you can align an objective with only one other objective.

Aligning Worker Objectives

When sharing and alignment are enabled, managers receive the Align Objectives task. This optional task enables you to align the objectives of workers who report to you with your own objectives. In the Alignment column, you can align each objective in a worker's personal scorecard with one of your own objectives. As you own these objectives, you do not have to share them with the worker first. You may want to perform Align Worker Objectives when workers have initiated the objective-setting process and have no access to shared objectives.

Tracking Objectives

When the HR Professional publishes a Performance Management Plan (PMP), managers and workers who belong to the plan each receive the View and Track Objective Progress task. The task appears in the Performance Management Task List at the start of the performance-management period and is enabled throughout.

Recording Progress

Workers can complete the following fields for each objective:

• Complete (%)

• Achievement Date

The application considers an objective as incomplete objective if the Complete % is less than 100 and the Achievement Date field is blank. When you select the Previous Objectives option while copying objectives, the application includes such

incomplete objectives in the next scorecard.

- Actual

  This field applies to objectives with quantitative measurement style (those with target values) only.

Workers can add comments about their objective achievement.

Managers can view a worker's reported progress using View and Track Objective Progress from the Performance Management Task List. They can also:

- Update a worker's progress.

- For objectives with the qualitative measurement style and against which the worker has recorded an achievement date, select the Verified option. This option indicates that the manager has confirmed that the objective is complete. Managers can view the comments provided by workers and make changes as required.

See: Measuring Objectives, page 1-108

Workers and managers can update progress as often as required throughout the performance-management period. Enterprises can require workers to update progress at regular intervals (for example, monthly) to maintain focus on objectives.

If the application creates appraisals automatically from the PMP, achievement dates recorded during the objective-tracking process appear automatically in the Objectives section of the appraisal.

When updating appraisals, workers and managers can use the Quick Update feature to change the objective details. The fields that are available for update depend on the measurement style of the objective: qualitative, quantitative, or none.

Viewing Alignment of Objectives Using Line of Sight

Managers and workers can view the alignment of their objectives with reference to other objectives in a hierarchy using the Employee Self-Service responsibility. On the Track Objectives Progress page, workers can click the Line of Sight icon for their objectives to view the alignment of their objectives (either by cascading or aligning) in their enterprise.

You cannot view the alignment of an objective if the objective is not cascaded. or aligned. The Line of Sight icon for that objective is grayed out.

Viewing Alignment of Objectives, page 1-121

Viewing Alignment of Objectives

The Line of Sight page displays the alignment of objectives in the following regions:

- View Upward Alignment of Objectives

- View Downward Alignment of Objectives

> **Note:** These regions appear only if your system administrator has enabled them for you.

In a PMP, the HR Professional can select either cascading or parallel objective setting. In a cascading process, managers start objective setting; in a parallel process, workers start objective setting.

The Line of Sight page displays objectives in a hierarchy regardless of the objective setting approach (cascading or parallel).

The following example illustrates the Line of Sight feature:

Vision Corporation consists of two departments:

- Corporate Sales and Marketing

- Product Sales

The Corporate Sales and Marketing department has set the Increase Sales Revenue to 500,000 USD objective in the financial year. Paul Smith manages the Corporate Sales and Marketing department and has cascaded this objective to his direct reports, Dan Bird and Tracy Price. He also shares this objective with Alison Faith.

The objective of the Product Sales department is to Increase Product Sales and generate a revenue of 250,000 USD. Alison Faith manages the Product Sales department and has cascaded this objective to her direct reports, John Taylor and Anna Harold. Alison Faith aligns her objective with Paul Smith's objective Increase Sales Revenue to 500,000 USD.

When these employees navigate to the Line of Sight page (from the Employee Self-Service responsibility), they can view the alignment of their objectives in a hierarchy:

- Paul Smith can view the downward alignment of his objective with that of his direct reports, Dan Bird and Tracy Price and also with Alison Faith.

- Alison can view the upward alignment of her objective with that of Paul Smith's objective. She can also view the downward alignment of her objectives with John Taylor and Anna Harold.

- Dan, Tracy, John, and Anna can view the upward alignment of their objective with that of their respective managers.

Personal Scorecards

A personal scorecard comprises the objectives of a single worker associated with a single Performance Management Plan (PMP). Workers who belong to more than one PMP have multiple personal scorecards. Also, a worker can have more than one

personal scorecard from a single PMP if the worker has multiple assignments and the plan does not apply to primary assignments only.

The application generates a worker's personal scorecard when the HR Professional first publishes the PMP. At that time, the scorecard status is either Not Started: With Manager or Not Started: With Worker, depending on the objective-setting method. In a cascading objective-setting process, managers start the updating process; in a parallel objective-setting process, workers start the objective-setting process.

See: Cascading Objectives, page 1-110 and Setting Objectives in Parallel , page 1-113

Populating Personal Scorecards

When the application generates a personal scorecard, it can include:

- Objectives from the Objectives Library for which workers are eligible

  See: Allocating Objectives to Workers Automatically, page 1-115

- Incomplete objectives from a previous personal scorecard

During an objective-setting period, both managers and workers can update workers' personal scorecards.

Ways of populating a personal scorecard during an objective-setting period include:

- Creating new, individual objectives

- Copying objectives from previous scorecards

- Copying shared objectives

- Copying objectives from the Objectives Library

- Duplicating objectives already in the scorecard

- Cascading objectives from managers to workers

You can also update and delete objectives in the personal scorecard. An objective's Created By field indicates who created the objective. The value Eligibility Criteria means that the application allocated the objective to you automatically.

The objective-setting process itself is task driven. Personal scorecards can transfer between managers and workers as often as necessary during an objective-setting period. At the end of an objective-setting period, managers publish the personal scorecards of workers who report directly to them.

See: Manager Performance-Management Tasks, page 1-126 and Worker Performance-Management Tasks, page 1-138

Monitoring Scorecard Status

The HR Professional can monitor personal scorecards from creation to publication using the Performance Management Plans function. On the Monitor Plans page, you can monitor plans to view scorecard and appraisal details. You can view scorecard summary of plans at different statuses such as Published, Not Yet Started With Worker, and Not Yet Started With Manager. You can view appraisal summary of plans at different statuses such as Published, Not Yet Started With Worker, and Not Yet Started With Manager. If a plan has more than one appraisal period, then select the appraisal period for which you want to view the details.

See: Monitoring and Rolling Back Performance Management Plans, page 1-92

Viewing and Tracking Personal Scorecards

Workers and managers can perform the View and Track Objective Progress task to view personal scorecards and record progress against individual objectives. They can update objectives during a specific stage of the performance process, even though the View and Track Objective Progress task is enabled throughout the performance-management period.

- If the PMP includes only the Objective Setting task, then record progress for objectives within the objective setting period after the completion of the Finish objective setting task.

- If the PMP includes both the Objective Setting and Appraisals tasks, then record progress for objectives within the objective setting period after the completion of the Finish objective setting task, and before the appraisal task start date.

See: Tracking Objectives, page 1-120

Personal Scorecards After an Objective-Setting Period

After the end of an objective-setting period, you cannot alter the contents of the scorecard by updating, deleting, or adding objectives unless:

- The HR Professional alters the dates of the objective-setting period and republishes the PMP.

  In this case, the application may reset the scorecard status to enable you to resume objective setting.

- The HR Professional has explicitly enabled you, in the PMP, to make changes outside the objective-setting period. In this case, the end date of the objective-setting period is a proposed deadline only.

If the HR Professional creates a new objective in the Objectives Library for which you are eligible, the application adds that objective automatically to your personal scorecard

if the HR Professional republishes the PMP.

See: Updating Objectives, page 1-107

Personal Scorecards in the Appraisal

Personal scorecards appear automatically in the Objectives sections of appraisals if:

- The application generates appraisals automatically.

- The appraisal template identified in the PMP includes an objective-assessment template.

Objectives appear in the Objectives section only if the Appraise option in the objective definition is selected; any objective for which Appraise is deselected does not appear.

During the appraisal, workers and managers can add, update, and delete objectives in the Objectives section of the appraisal.

> **Note:** If the application does not create appraisals automatically, there is no automatic connection between the personal scorecard and the appraisal. In this case, you can transfer your objectives manually to the Objectives section of the appraisal, if appropriate.

Personal Scorecards After Appraisals

The application automatically updates personal scorecards to match the Objectives sections of completed appraisals. For example, if you include an additional objective in the Objectives section during the appraisal, then the application copies the new objective to your personal scorecard when the appraisal is complete. You can record tracking information for this new objective after the appraisal, and the objective appears in the Objectives section of subsequent appraisals during this performance-management period. At the end of this period, the application can copy incomplete objectives to future personal scorecards.

See: Performance Management Plans, page 1-73

Deletion of Personal Scorecards

When a plan is republished, the application deletes scorecards and appraisals of all those employees who are no longer part of the plan population as of the system date, for reasons such as termination or transfer or change of assignment data (supervisor or position).

Using the Performance Management Plan Administration Home Page, HR Professionals can remove scorecards from published performance management plans. See: Performance-Management Plan Administration Tasks, page 1-142

Workforce Performance Management Task Lists

Manager Performance-Management Tasks

Your Performance Management Task List includes an entry for each Performance Management Plan (PMP) to which you belong. Under each PMP entry appears a list of tasks that the application generates when the HR Professional publishes the PMP. The application enables these tasks at appropriate times during the performance-management period.

The tasks that you see and the order in which you perform them depend on configuration choices made in the PMP. For example, if the PMP includes appraisal creation, the application generates the Manage Appraisals task and allocates it to you. Otherwise, the task does not appear. Similarly, if the PMP uses the parallel objective-setting process, your first task is likely to be Review Worker Changes (as the worker starts the objective-setting process). If the PMP uses the cascading objective-setting process, your first task is likely to be Cascade or Set Objectives (as *you* start the objective-setting process).

This topic describes the manager performance-management tasks, the associated notification messages, and the Switch Manager function. The first five tasks described (Cascade or Set Objectives, Align Objectives, Transfer Scorecards to Workers for Action, Review Worker Changes, and Finish Objective Setting) are the objective-setting tasks and are enabled during objective-setting periods. (They are enabled outside objective-setting periods only if the HR Professional has explicitly allowed you, in the PMP, to make changes outside the objective-setting period.)

Cascade or Set Objectives

The Cascade or Set Objectives task enables you to set objectives for workers who report to you directly. You can:

- Cascade one or more objectives to a single worker or multiple workers using the Cascade Objectives page. You can cascade one or more objectives to *single or multiple workers*. Using this feature, managers can cascade their objectives to their workers, either by duplicating their objectives or creating new objectives that are linked to their own objectives.

- Add one or more objectives to each worker's personal scorecard by creating new objectives, copying objectives (from the Objectives Library, from the worker's previous scorecards, or from objectives shared with the worker), or duplicating and aligning objectives already in the personal scorecard.

- Cascade one or more of your own objectives to some or all of your team members. If you use this approach, you must first use Employee Self-Service to set your own

objectives.

See: Cascading Objectives, page 1-110

> **Note:** Your manager must have approved objectives that you set for
> yourself before you can cascade those objectives to your team
> members. If you are the topmost manager of the plan population to
> which a cascading plan is published, then your scorecard is
> approved automatically.

You can use either or both of these approaches to update a single personal scorecard.
Note also that you do not have to set objectives for workers, even though this task
appears in your task list. A worker's personal scorecard may already include objectives
that the application allocated automatically or copied from the previous personal
scorecard or appraisal. You can simply transfer the scorecard to the worker without
making further changes, if appropriate. You can also update or delete objectives already
in a worker's personal scorecard.

You can perform this task only when the scorecard status is Not Yet Started: With
Manager or With Worker. Changes that you make to personal scorecards are not visible
to their owners until you perform the Transfer Scorecards to Workers for Action task.

Align Objectives

The Align Objectives task enables you to define relationships between your workers'
objectives and your own objectives. You may want to perform this task if you have
already shared some of your objectives (using Employee Self-Service) with one or more
of your team members and added supporting objectives to those workers' personal
scorecards.

See: Sharing and Aligning Objectives, page 1-118

This task appears in your task list only if the plan administrator enables sharing and
alignment in the PMP. You do not have to perform this task, even though it appears in
your task list. Not all objectives must be aligned with other objectives. Also, this task is
not relevant for objectives that you have allocated using the cascading process, as these
objectives are automatically aligned with the objectives that you cascade.

Transfer Scorecards to Workers for Action

When you have finished updating a worker's personal scorecard, you perform this task
to transfer the scorecard to its owner. In the notification message, you can specify
changes that the worker can make to the scorecard. When you perform this task, the
scorecard status changes to With Worker.

You must perform this task if you have updated the worker's personal scorecard. You
cannot perform the Finish Objective Setting task (which publishes the scorecard) if you
have not first transferred the updated scorecard to its owner.

Review Worker Changes

You perform the Review Worker Changes task as workers return their reviewed or updated personal scorecards to you for approval. This task lists all personal scorecards with changes that you have not yet reviewed and with a status of Approval Requested. You can:

- Approve all changes to the scorecard. The scorecard status changes to With Manager, and you can make further changes to the scorecard, if necessary.

- Request further action. In this case, the application returns the personal scorecard to the worker. In the notification message, you can specify any changes that you want the worker to make. The application changes the scorecard status to With Worker. When the scorecard status changes back to Approval Requested, you can review the scorecard again.

- Reject all changes to the scorecard. In this case, the application removes *all* changes that the worker has made to the scorecard. If that is not the desired effect, select the Request Further Action option. When you reject the worker's changes, the scorecard status changes to With Manager, and you can make further changes to the scorecard, if necessary.

  Note: To publish the worker's scorecard, you must perform the Finish Objective Setting task. When you click Approve and Finish, the application takes you directly to that task.

Finish Objective Setting

You perform this task once for each worker when you have finished the objective-setting and review processes. You can perform this task only if the scorecard status is With Manager. You cannot perform this task (the task is disabled) if the scorecard contains changes that you have not transferred to the worker using the Transfer Scorecards to Workers for Action task. When you perform the Finish Objective Setting task, the scorecard status changes to Published.

  Note: If you do not perform this task and appraisals are included in the PMP, any changes that you make to scorecards during the objective-setting process are lost when the application generates appraisals for the first appraisal period.

View and Track Objective Progress

This task is enabled throughout the performance-management period. All personal scorecards, regardless of their statuses, are accessible from this task. You can:

- View a worker's personal scorecard by clicking the Details icon. If the worker is recording progress against objectives, you can view that information here.

- Update a worker's progress by clicking the Action icon. You can update any of the tracking fields (Complete %, Achievement Date, Actual, and Verified) for an objective. The Complete % value can be greater than or less than 100.

    Note: You select Verified when you have confirmed that the worker has achieved an objective whose measurement style is qualitative.

You can update objectives during a specific stage of the performance process, even though the View and Track Objective Progress task is enabled throughout the performance-management period.

- If the PMP includes only the Objective Setting task, then record progress for objectives within the objective setting period after the completion of the Finish objective setting task.

- If the PMP includes both the Objective Setting and Appraisals tasks, then record progress for objectives within the objective setting period after the completion of the Finish objective setting task, and before the appraisal task start date.

The ability to update the objectives and objectives' details added by workers depends on the setting of the HR: Allow Updates To Objective Details Added By Appraisee profile option.

See: Measuring Objectives, page 1-108 and Tracking Objectives, page 1-120

Manage Appraisals

The Manage Appraisals task appears in your task list only if the PMP includes appraisals. It occurs once for each appraisal task (each combination of appraisal template and appraisal period) identified in the PMP. For example, if the PMP identifies a midyear appraisal and a full-year appraisal, two Manage Appraisals tasks appear in the task list for that PMP.

The application enables this task on the appraisal-task start date specified in the PMP and disables it on the appraisal task end date. You can complete PMP appraisals after the appraisal task end date and before the plan period end date, if your enterprise sets the HR: Update PMP Appraisals After the Appraisal Period profile option to Yes.

    Note: If you do not perform the Finish Objective Setting task before the appraisal-generation date specified in the PMP, the application discards all changes made to personal scorecards during the objective-setting period before changing the scorecard status to Published.

While this task is enabled, the application disables the objective-setting tasks. To

manage objectives during an appraisal-task period, you use the Objectives section of the appraisal.

When you select this task, your Appraisals home page lists appraisals for PMP members for whom you are main appraiser. If the PMP identifies you as the appraisal initiator, you have ownership of the appraisal. If the appraisee is the initiator, you cannot update the appraisal until the appraisee first shares it with you.

See: The Appraisal Process, page 1-158

Notification Messages

You receive notification messages when:

• The application generates your task list, if the plan administrator selects Notify Plan Population.

• Workers transfer their personal scorecards to you for approval.

You issue notification messages when:

• You transfer personal scorecards to workers.

• You publish workers' personal scorecards.

• Plan administrator reopens scorecards, refreshes scorecards, rolls back PMPs, reopens appraisals, and sends mass notifications.

Using the Switch Manager Function

You can access only PMPs to which you belong. If a worker who reports to you belongs to a PMP of which you are not a member, you can use the Switch Manager function to access that worker's personal scorecard.

Note that the Switch Manager function is enabled by default, but may be disabled in your enterprise.

Changes Due to Performance Management Plan Administrative Tasks

Enroll Workers in a Plan

When performance management plan administrators enroll workers in a plan, managers can complete the following tasks in the performance management plan (PMP) cycle:

• Cascade or set objectives

• Align objectives

• Transfer scorecards to workers for action

- Review worker changes

- Finish objective setting

- View and track objective progress

- Manage appraisals

Reopen Scorecards

When performance management plan administrators reopen a scorecard, the scorecard status changes to 'With Manager' for both cascading and parallel plans.

The scorecard is available to the manager in the Set Worker page to add new objectives and cascade own objectives.

Access Enwisen from Info Online

If your enterprise enables the Info Online content container, then you access the web site of Enwisen, a third-party information provider. Click the Handbook link to access information, for example, your company's information on performance appraisals.

HR Professional Performance Management Tasks

Using the Performance Management page, HR Professionals can perform the following tasks:

Set up Performance Management Information

HR Professionals can:

- **Manage objectives library**

  The Objectives Library is a collection of reusable objectives that you create and maintain using the Objectives Library function. This function enables you to manage the enterprise objective-setting process efficiently.

  See: The Objectives Library, page 1-103

- **Manage questionnaires**

  The Questionnaire Administration function helps to create questionnaires for use in appraisals or surveys.

  See: The Questionnaire Administration, page 1-204

- **Manage appraisal templates**

  The appraisal template is the design document for an appraisal. The template's main function is to configure all sections of the appraisal to suit the appraisal

purpose or enterprise requirements.

See: The Appraisal Template, page 1-187

- **Manage competency and objective templates**

  To assess competencies and objectives during an appraisal, you must include a competency assessment template and an objective assessment template in the appraisal template. You design competency assessment templates and objective assessment templates to meet enterprise requirements.

  The competency assessment template specifies how to assess competencies in appraisals.

  The objective assessment template specifies how to assess objectives in appraisals.

  See: Assessment Templates, page 1-192

Administer Performance Management Plans

HR Professional can:

- **Manage performance management plans**

  The Performance Management Plan (PMP) defines the performance-management process for a specified period, such as a calendar year. HR Professionals can create and manage the PMP using the Performance Management Plans function.

  See: Performance Management Plans, page 1-73

- **Manage performance management plan administration tasks**

  Using the Performance Management Plan Administration Home Page, HR Professionals can perform tasks such as enrolling workers into published plans or refreshing scorecards.

  See: Performance-Management Plan Administration Tasks, page 1-142

Monitor Processes and Reports

Using the Process Monitor and Reports link in the Batch Requests region, HR Professionals can navigate to the Monitor Concurrent Programs page to view logs, summary, and error reports of Oracle Performance Management processes.

See: Monitoring Processes and Reports, page 1-136

Running Requests

HR Professionals can run the following requests from the Batch Requests region:

- Mass Notification

See: Running the Mass Notifications Program, page 1-100

- Mass Appraisal Creation

  See: Running the Mass Appraisal Creation, page 1-99

- Mass Change Main Appraiser: Run this request to perform mass change of main appraiser of performance management plan appraisals. To perform mass change of main appraiser of appraisals created using the Appraisals function, you must select the Mass Change Main Appraiser function available from the HR Professional responsibility.

  See: Performing Mass Change of Main Appraiser, page 1-134

To view logs, summary, and error reports of these process, see: Monitoring Processes and Reports, page 1-136

Switch as Manager and Switch as Employee Functions

Switch as Manager

An HR professional can work as another manager including the top manager in the plan hierarchy. This function enables an HR Professional to access Performance Management Plans of the switched manager and work on the performance-management tasks.

Switch as Employee

This function enables an HR Professional to work as another employee and access that employee's performance-management tasks.

> **Note:** The Switch as Manager and Switch as Employee functions are available only for the objective setting and tracking tasks in a PMP.
>
> The Manage Appraisal task is not available to HR Professionals when they switch as employees or managers.

Viewing and Updating Appraisals of Terminated Workers

The following table explains how HR Professionals can view and update appraisals of terminated workers:

Task	Performance-Management Plan Appraisals	Appraisals created using the Appraisals Function
View appraisals	Use the Switch as Manager function.	Use Advanced Search available in the Appraisals: People page from the Appraisals function.
Update appraisals	Use the Update Appraisals of Terminated Workers option available in the Performance Management Plan Administration Tasks page. See: Performance-Management Plan Administration Tasks, page 1-149	Use Advanced Search available in the Appraisals: People page from the Appraisals function.

When updating appraisals, HR Professionals can change the main appraiser, and enter overall rating and comments for standard and performance-management appraisals.

> **Note:** To enable HR Professionals to view and update appraisals of terminated workers the *pEnableTerms* parameter value must be set to Y for the View Appraisals Manager - HR Sys Admin (HR_VIEW_SYSAPPR_MGR_SS) function. For more information, see: Configuring the Appraisals Function, page 1-28

Performing Mass Change of Main Appraiser

Oracle Performance Management enables administrators to perform a mass change of main appraiser of appraisals in a single transaction using the Mass Change Main Appraiser request.

Using the Mass Change Main Appraiser: Search page, as a plan administrator, you can change the main appraiser of performance management plan appraisals and appraisals created using the Appraisals function.

To perform mass change of main appraiser of:

- Appraisals created using the Appraisals function, click the Mass Change Main Appraiser link in the HR Professional responsibility.

- Performance management plan appraisals, click the Mass Change Main Appraiser link in the Batch Requests region of the Performance Management page.

Prerequisite: Before you run the concurrent request, you must ensure that the supervisor in the Assignment record of workers is correct. Use the Assignment window in Oracle HRMS to view and correct information, if required.

Changing the Main Appraiser of Appraisals Created Using the Appraisals Function

Plan administrators can use the following search criteria to search for appraisals with incorrect main appraiser and to perform mass change of main appraiser:

• Period start and end dates

• Appraisal template

• Supervisor name

• Organization name

The period start and end dates and appraisal template search criteria are mandatory.

Changing the Main Appraiser of Performance Management Plan Appraisals

To perform mass change of main appraisers of performance management plan appraisals, the following search criteria are available:

• Plan

• Appraisal period

• Supervisor name

• Organization name

The Plan and appraisal period search criteria are mandatory.

Submitting the Request

When plan administrator searches either appraisals created using the Appraisals function or performance management plan appraisals, the search results by default display only those records where the main appraiser in the worker's appraisal is different from the supervisor in the worker's assignment record. Administrators can deselect the Search Appraisals with Different Main Appraisers Only check box to view appraisals with correct main appraiser.

In the search results table, select the correct main appraiser and click Continue. Review the changes in the Appraisal Details page and submit the request. The program updates all appraisal records containing incorrect main appraisers to the current supervisors of workers. Navigate to the Monitor Concurrent Program page to view log of the request. See: Monitoring Processes and Reports, page 1-136

> **Note:** If required, you can change the main appraiser for appraisals even if the main appraiser is correct. The program updates all appraisal records and changes the current main appraiser to the selected value. In such a scenario, the previous main appraiser becomes a participant of type 'Appraiser' in the appraisal process.

Monitoring Processes and Reports

The Monitor Concurrent Program page helps HR Professionals to view logs of concurrent processes, view summary reports, and analyze error reports.

Viewing Logs

HR Professionals can view logs of the following processes:

- Plan administration requests submitted from the Performance Management Plan Administration Home page

  See: Performance-Management Plan Administration Tasks, page 1-142

- Publish Performance Management Plan program

  See: Running the Publish Performance Management Plan Program, page 1-97

- Mass Appraisal Creation

  See: Running the Mass Appraisal Creation, page 1-99

- Refresh Appraisal Summary program.

  See: Running the Refresh Appraisal Summary Program, page 1-101

- Mass Notifications program

  See: Running the Mass Notifications Program, page 1-100

- Performance Management Plan Appraisal Rating Summary

  See: Viewing Performance Management Plan Appraisal Rating Summary, page 1-93

- Mass Change Main Appraiser

  See: Performing Mass Change of Main Appraiser, page 1-134

The Summary and Error reports are available for Publish Performance Management Plan and Mass Appraisal Creation processes only.

Viewing a Summary Report

The Summary Report shows the following regions:

- **Process Status**

  This region displays:

  - The number of workers that the program has processed for a business group.

  - Processing status, such the number of records completed, number of records that ended with warning, and number of records with an error.

  - Eligibility status that includes number of records of workers who are eligible and number of records of workers who are not eligible. For example, when you run the Publish Performance Management Plan program, you can view the number for workers who are eligible for the plan, and number of workers who are not eligible for the plan or to whom the plan is not published.

- **Error Summary**

  This region displays:

  - Error or warning text.

  - Type of message whether Warning or Error.

  - Number of worker records that have ended with warning or error.

Viewing an Error Report

The Detailed Error Report helps you to analyze why a program failed.

This report displays:

- Worker name

- Worker number

- Business group that a worker belongs to

- Main appraiser of the worker

- Legislation code of the business group

- Worker's e-mail address

- Error or warning text

If the Mass Appraisal Creation program ends with an error, you can view the report to understand reasons for the failure. There may be multiple reasons such as the absence of main appraiser or the appraisal start period is outside the appraisee's current employment dates.

Worker Performance-Management Tasks

Your Performance Management Task List includes an entry for each Performance Management Plan (PMP) to which you belong. Under each PMP entry appears a list of tasks that the application generates automatically. The tasks are those appropriate to the PMP and can vary from one PMP to another. The application enables these tasks at appropriate times during the performance-management period. For example, you can perform the appraisal-management task during the appraisal-task period only.

If you have multiple personal scorecards for the same PMP (because you have multiple assignments), use the Switch Assignment task in the task list to display the task list for each assignment. You may report to a different manager or supervisor in each assignment.

This topic describes all worker performance-management tasks and their associated notification messages.

Set Objectives

The Set Objectives task enables you to update your personal scorecard of objectives. This task is usually enabled during the objective-setting period only, unless the Allow Changes Outside This Period check box is selected for the performance management plan. If the Allow Changes Outside This Period option is selected, then the Set Objectives task is enabled until the appraisal task begins. If there are no appraisals tasks, then the Set Objectives task is enabled till the plan end-date. The dates of the objective-setting period appear in the task's Start Date and End Date columns in the Performance Management Task List. The scorecard status must be either With Worker or Not Started: With Worker.

- The scorecard status is With Worker if your manager started the objective-setting process and has transferred your personal scorecard to you. You receive a notification message that may include your manager's instructions for updating the scorecard.

- The scorecard status is Not Started: With Worker if you are starting the objective-setting process. The scorecard may already contain some objectives that the application allocated to you automatically or copied from a previous appraisal or personal scorecard.

You can update your personal scorecard by:

- Creating new objectives

- Copying objectives from the Objectives Library, from your previous scorecards, or from shared objectives (objectives that others have shared with you)

- Duplicating objectives already in the scorecard and updating them (for example, to change the objective name)

- Updating objectives already in the scorecard

You can also review any objectives that others (typically your manager) have shared with you. Having access to shared objectives enables you to define supporting objectives. For example, if your manager shares the Increase Sales of Electrical Goods objective, you can define an objective that will contribute to the shared objective (but does not have to be identical to it). For example, your objective could be Redesign Sales Area for Electrical Goods. You make the relationship between the two objectives explicit when you perform the Align Objectives task.

> **Note:** Workers can update objectives added by their managers only in the objective-setting period. When the appraisal-task period begins, then workers cannot update objectives created by their managers. They can only add the objective rating, weighting values, or comments.

Align Objectives

The Align Objectives task enables you to define relationships between any of your objectives and objectives that others (such as your manager) have shared with you. For each supporting objective in your personal scorecard, you select the shared objective that it supports in the Aligned To column. If you have defined no supporting objectives, you do not need to perform this task.

If it appears, this task is usually enabled during the objective-setting period only. This task does not appear if sharing and alignment are not required activities.

Share Objectives

The Share Objectives task enables you to give other members of the PMP access to your objectives. You can allow others to:

- View an objective.

- View an objective and align their objectives with it.

Enterprise policy determines whether you must perform this task and for which objectives. For example, if you are a manager, you can use Employee Self-Service to share objectives with your team as an alternative to the cascading process.

If it appears, this task is usually enabled during the objective-setting period only. This task does not appear if sharing and alignment are not required activities.

Finish Objective Setting

When you have finished updating your personal scorecard, you perform the Finish Objective Setting task to transfer the scorecard to your manager for approval. In the notification message, you can explain any changes that you have made. The scorecard status changes to With Manager, and you can make no further changes unless your manager returns the scorecard to you. If this happens, you receive a notification message from your manager.

This task is usually enabled during the objective-setting period only.

The ability for managers to update the objectives and objectives' details added by workers depends on the setting of the HR: Allow Updates To Objective Details Added By Appraisee profile option.

View and Track Objective Progress

The View and Track Objective Progress task enables you to view your personal scorecard and record progress against your objectives. For incomplete objectives, you can update the Complete %, Achievement Date, and Actual values. You can enter an achievement date for objectives regardless of whether or not the Complete % value is 100. Your manager can review values that you enter here.

You can update objectives during a specific stage of the performance process, even though the View and Track Objective Progress task is enabled throughout the performance-management period.

- If the PMP includes only the Objective Setting task, then record progress for objectives within the objective setting period after the completion of the Finish objective setting task.

- If the PMP includes both the Objective Setting and Appraisals tasks, then record progress for objectives within the objective setting period after the completion of the Finish objective setting task, and before the appraisal task start date.

Manage Appraisals

The Manage Appraisals task enables you to review and update your own appraisal and is enabled from the start of the appraisal-task period to the appraisal task end date. The dates of the appraisal-task period appear in the task's Start Date and End Date columns in your Performance Management Task List. While this task is enabled, all objective-setting tasks are disabled. (During appraisal activity, you can update your objectives in the appraisal rather than in your personal scorecard.) If multiple appraisals (for example, midyear and full-year appraisals) occur during a single performance-management period, this task appears once in your Performance Management Task List for each appraisal period defined for the PMP.

> **Note:** You can complete PMP appraisals after the appraisal task end date and before the plan period end date, if your enterprise sets the HR: Update PMP Appraisals After the Appraisal Period profile option to Yes.

If you are the appraisal initiator, you see the appraisal on your Appraisals home page with the status of Planned at the start of the appraisal-task period. If your manager is the appraisal initiator, you receive a notification message when your manager shares the appraisal with you.

Workers may no longer be eligible for a plan if they are transferred out of the plan or placed on a new assignment, which is not primary. Then such plans are not visible on the worker's Performance Management Home page. If a worker is transferred out of a plan, and the appraisal is at the Pending Appraisee Feedback status, then the worker can update and complete the appraisal using the Provide Final Feedback button on the appraisal notification.

Performance-Management Notification Messages

You receive performance-management notification messages when:

- Your manager transfers your personal scorecard to you.

- Another member of the PMP shares an objective with you.

You may also receive a notification message when the application generates your task list.

You issue notification messages when:

- You transfer your personal scorecard to your manager.

- You share your objectives with other members of the PMP.

- Plan administrator enrolls workers into a plan, reopens scorecards, refreshes scorecards, rolls back PMPs, removes worker scorecards, reopens appraisals, and sends mass notifications.

Changes Due to Performance Management Plan Administrative Tasks

Enroll Workers in a Plan

When performance management plan administrators enroll workers in a plan, workers can complete the following tasks in the performance management plan (PMP) cycle:

- Set objectives

- Align objectives

- Share objectives

- Finish objectives

- View and track objective progress

- Manage Appraisals

Access Enwisen from Info Online

If your enterprise enables the Info Online content container, then you can access the web site of Enwisen, a third-party information provider. Click the Handbook link to access information, for example, your company's information on performance appraisals.

Performance-Management Plan Administration Tasks

Using the Performance Management Plan Administration Home Page, HR Professionals can perform the following tasks for published performance-management plans:

- Change the top supervisor for a plan

- Enroll workers into published plans

- Extend the objective setting deadline date for workers

- Remove worker scorecards

- Reopen worker scorecards

- Refresh worker scorecards

- Reopen appraisals of workers

- Run the Refresh Appraisal Summary program

- Transfer objectives of workers

- Update appraisals of terminated workers

Changing the Top Supervisor for a Plan

Using the Change the Top Supervisor for Plan option, HR Professionals can change the topmost supervisor for a plan, if the topmost supervisor of the plan is transferred out of the plan or terminated.

> **Note:** This option is applicable to plans that use the supervisor hierarchy only.

1. Select a published plan, then option, and click Continue. The application displays the plan details along with the current supervisor name.

2. Search for a new supervisor using the search criteria such as worker name, email, or worker number.

3. Select the new topmost supervisor from the active list of workers displayed in the search results.

4. Select whether to commit or rollback the results of the task in the Mode field. Select Rollback to review the results in the process log file without committing changes to the database. In Rollback mode, the request runs in the report-only mode and does not update the database. Note down the request ID of the rollback request. After analyzing the results in the log on how changing the topmost supervisor of the plan impacts the plan population, select the Commit mode. Enter the request ID of the rollback action when you select the Commit mode.

5. Click Submit and the application runs a concurrent request to change the topmost supervisor for the plan.

6. View your request using the request ID on the Monitor Concurrent Programs page. The log file displays the concurrent request results.

If the process completes successfully, then the application rebuilds the plan population based on the changed topmost supervisor. The log displays the total number of workers in the plan prior to changing the topmost supervisor and the total number of workers in the plan after changing the topmost supervisor.

The new topmost supervisor receives FYI notification after the task is processed.

Enrolling Workers into Published Plans

Using the Enroll Workers option, HR Professionals can include new hires and transferred workers into published performance management plans, if they qualify the criteria defined for the plan population.

1. Select a published plan, then option, and click Continue. The application displays the plan details.

2. Select active employees or contingent workers for enrolling into a plan and submit the request. You can enroll 25 workers at a time.

3. Click Submit and the application runs a concurrent request to enroll selected workers into the plan. The process verifies if the worker is eligible for the plan by

checking whether the worker belongs to the hierarchy specified in the plan. You can view your request using the request ID on the Monitor Concurrent Programs page. The log file displays the concurrent request results.

The application displays a warning message if workers cannot be enrolled into the plan. If the process completes successfully, then it:

- Creates scorecards for workers.

- Adds objectives based on the workers' eligibility, if the Automatic Allocation of objectives check box is enabled for the plan.

- Creates appraisals, if the plan has an appraisal period and if at least one appraisal exists for the plan.

- Sends workers FYI notifications.

Extending the Objective Setting Deadline Date for Workers

Using the Extend Objective Setting for Worker option, HR Professionals can extend the objective setting deadline date for a worker or group of workers till the date appraisals start for a plan that includes objective setting and appraisals. Use this option if workers have not completed their objective setting task within their objective setting period.

1. Select a published plan, then option, and click Continue.

2. Search for workers using the search criteria such as worker number, name, or email. The search results display the worker name, supervisor name, and the current objective setting date.

3. Enter the new objective setting date separately in each row for each worker or enter a common objective setting date for selected workers and click Default to All to apply the new date for all the selected workers.

4. Click Submit and the application runs a concurrent program.

5. View your request using the request ID on the Monitor Concurrent Programs page. The log file displays the concurrent request results.

If the program runs successfully, then the objective setting date of the selected workers is extended and they receive FYI notifications. From their home page, workers can access their objective setting task and complete their objective setting.

Refreshing Scorecards

Using the Refresh Scorecard option, HR Professionals can refresh scorecards to reevaluate the objective eligibility and include additional objectives, if any, into the scorecard, due to changes in eligibility. For example, because of promotion a worker

becomes eligible for more objectives. In this case, the refresh action reevaluates the objective eligibility criteria and adds the additional objectives to the worker's existing scorecard based on the changed eligibility

> **Important:** When you republish a plan using the Refresh Scorecard option, new eligible objectives do not get automatically added to the appraisal of a worker until you run the Mass Appraisal Creation program. See: Running the Mass Appraisal Creation Program, page 1-99

1. Select a published plan, then option, and click Continue.

2. Select workers whose scorecards that you want to refresh and submit the request. Search for scorecards using the worker name. The search returns active scorecards available for the plan. You can refresh 25 scorecards at a time.

3. Click Submit and the application runs a concurrent request to refresh scorecards of the selected workers.

4. View your request using the request ID on the Monitor Concurrent Programs page. The log file displays the concurrent request results.

Managers and workers receive FYI notifications when scorecards are refreshed.

Removing Scorecards

Using the Remove Scorecard option, HR Professionals can remove scorecards of terminated workers or of workers who are no longer part of the plan population.

1. Select a published plan, then option, and click Continue.

2. Select the list of scorecards that you want to remove from the published plan, and submit the task. The application runs a concurrent request to remove the scorecards.

3. View your request using the request ID on the Monitor Concurrent Programs page. You can view a log file for the request. The log file displays the concurrent request results. You can remove 25 scorecards at a time.

Workers receive FYI notifications when scorecards are removed.

Reopening Appraisals

Using the Reopen Appraisal option, HR Professionals can reopen appraisals that are at the Pending Approval or Completed status. You can reopen 25 appraisals at a time.

1. Select a published plan, then option, and click Continue.

2. Select the appraisals that you want to reopen and submit the tasks. The application runs a concurrent request to reopen the appraisals.

3. View your request using the request ID on the Monitor Concurrent Programs page. The log file displays the concurrent request results.

Once an appraisal is reopened, the appraisal status changes to Ongoing. Managers and workers receive FYI notifications. Managers can access reopened appraisals from the Appraisals In Progress table and edit the appraisals. Managers must share the reopened appraisal with the appraisee, before completing this appraisal again.

Reopening Scorecards

Using the Reopen Scorecard option, HR Professionals can reopen scorecards if the objective setting period is open to enable managers to edit worker scorecards. You can reopen a scorecard if the Allow Changes Outside This Period check box is selected for the plan, and the appraisal period has not started. This feature helps in case a manager completes objective setting for a particular worker and then realizes that some objectives must be added to the worker's scorecard. You can reopen 25 scorecards at a time.

1. Select a published plan, then option, and click Continue.

2. Select the list of scorecards that you want to reopen, and submit the task. The application runs a concurrent request to reopen the scorecards.

3. View your request using the request ID on the Monitor Concurrent Programs page. You can view a log file for the request.

When the process reopens a scorecard, managers and workers receive FYI notifications, and the status of the scorecard changes to With Manager and is available for the manager to edit.

Transferring Objectives of Workers

Using the Transfer Objectives option, HR Professionals can copy objectives and competencies from a worker's source plan to the worker's new plan or destination plan. For information on details that are copied, see, this, page 1-147 table. You can use this option for workers who cannot access objectives or appraisals of the source plan as they are no longer part of the source plan population because of the transfer.

You can transfer objectives of single or multiple workers. You can select multiple workers belonging to the same source plan and who are required to be transferred to the same destination plan. The plan details that you view depend on the type of the plan: whether the plan includes only objective setting, only appraisal, or both objective setting and appraisal.

> **Note:** You cannot transfer objectives from the source plan to the destination plan, if the source plan includes only appraisals and the destination plan includes only objective setting.

1. Select a published plan, then option, and click Continue.

2. View the plan that includes information such as plan administrator, start and end dates, and previous plan name.

3. Select the destination plan and then select the details that you want to transfer from the source plan to the destination plan:

   1. Scorecard: Only scorecard is transferred from the source plan to the destination plan.

   2. Scorecard and Appraisal: Both scorecard and appraisal of the source plan are transferred to the destination plan.

   3. Worker: Only worker's details are transferred from the source plan to the destination plan without the scorecard and appraisal details. This option helps to remove workers from the source plan and enroll them into the destination plan.

4. Click Submit and the application runs a concurrent program.

5. View your request using the request ID on the Monitor Concurrent Programs page. The log file displays the concurrent request results.

The following table describes the details that are copied from the source plan to the destination plan considering when the transfer happens:

Details Copied from Source Plan to the Destination Plan

Plan Type	When Transfer Happens	Details Copied	Task for the New Supervisor
Objective Setting Plan	Worker's transfer happens before the objective setting period starts	No plan details are copied. No objective ratings or comments are copied.	Rate the approved objectives, add, or modify objectives.

Plan Type	When Transfer Happens	Details Copied	Task for the New Supervisor
Objective Setting Plan	Worker's transfer happens when the objective setting period is in progress regardless of the plan being a cascading or parallel plan and whether the scorecard is with worker or with manager	Only approved objectives are copied.	Rate the approved objectives, add, or modify the objectives.
Objective Setting Plan	Worker's transfer happens when the objective setting task is completed.	Only approved objectives without any ratings are copied.	Rate the approved objectives, add, or modify the objectives.
Appraisal Plan	Worker's transfer happens during the appraisal period	Completed and approved objectives are copied. Competencies are also copied. No objective ratings or comments are copied. Participation status in the source plan is closed. Questionnaire details are not copied. Overall rating, comments, and advancement potential details are not copied.	Rate the approved objectives, add or modify the objectives.
Plan includes objective Setting appraisal	Worker's transfer happens in the period between objective setting and appraisal.	Approved objectives are copied. No objective ratings or comments are copied.	Rate the approved objectives, add or modify the objectives.

Plan Type	When Transfer Happens	Details Copied	Task for the New Supervisor
Plan includes objective setting and appraisal	Worker's transfer happens during the appraisal period	Approved objectives and completed objectives are copied. Competencies are copied. Participation status in the source plan is closed. Questionnaire details are not copied. Overall rating, comments, and advancement potential details are not copied.	Rate the approved objectives, add, or modify the objectives.

Running the Refresh Appraisal Summary Program

In the Plan Name field, select the plan for which the application must refresh appraisal summary data for reporting purposes. If a performance management plan has multiple appraisals, select the specific appraisal period to view the corresponding appraisal summary. This process does not update any information related to appraisals, rather populates the rating summary information for managers in a separate summary table.

To monitor the program, click the Process Monitor and Reports link on the Performance Management Home page for HR Professionals and navigate to the Monitor Concurrent Programs page.

Updating Appraisals of Ex-Employees or Ex-Contingent Workers

Using the Update Appraisals of Terminated Workers option, an HR Professional can search for a performance-management plan appraisal of a terminated worker, which is at the Ongoing status. The Competencies, Objectives, and Questionnaire regions of the appraisal are read-only.

The HR Professional can update the following fields in an appraisal:

- Main Appraiser

  To transfer the appraisal to a new main appraiser

- Overall Rating

- Overall Comments

When an appraisal is transferred to an appraisee or pending appraisee feedback and the appraisee is terminated, the HR Professional can enter overall rating and comments and complete the worker's appraisal.

When the HR Professional completes updating an appraisal, Oracle Performance Management notifies appropriate recipients. The main appraiser receives notification when the HR Professional transfers the terminated worker's appraisal or completes the worker's appraisal. If a main appraiser is terminated and the HR Professional changes the main appraiser, the appraisee receives a notification to review the appraisal.

Impact of Plan Administration Tasks

The following table summarizes the changes when the HR Professional performs the plan administration tasks:

Impact of Plan Administration Tasks

Administration Task	Impact
Enroll workers in new plans	Managers can complete the following tasks in the performance management plan (PMP) cycle: • Cascade or set objectives • Align objectives • Transfer scorecards to workers for action • Review worker changes • Finish objective setting • View and track objective progress • Manage appraisals Workers can complete the following tasks in the PMP cycle: • Set objectives • Align objectives • Share objectives • Finish objectives • View and track objective progress • Manage Appraisals
Reopen scorecards	On reopening a scorecard, the scorecard status changes to With Manager for both cascading and parallel plans. The scorecard is available to the manager in the Set Worker page to add new objectives and cascade own objectives. Managers can view the alignment of objectives on the Line of Sight page if they log in using the Employee Self-Service responsibility.

Administration Task	Impact
Reopen appraisals	The appraisal status changes to Ongoing and the ownership moves to the Main Appraiser.
	Main appraisers can edit the appraisal and add competencies and objectives. They can share the appraisal with the Appraisee.
Refresh scorecards	The process adds objectives to the worker's scorecard based on the plan eligibility criteria.
Remove scorecards	After the process removes scorecards, workers no longer appear in the plan population.
Refresh Appraisal Summary	Updates the performance management plan appraisal data. This process enables managers to view the most up-to-date information on the Performance Management Plan Appraisal Rating Summary.
Update Appraisals of Terminated Workers	- When an HR Professional transfers an appraisal to a new main appraiser, the new main appraiser can update the appraisal of a terminated worker. - A main appraiser can review a terminated worker's appraisal if the HR Professional completes the appraisal. - An appraisee can review the completed appraisal and provide feedback, if a main appraiser is terminated and the HR Professional completes the appraisal.
Extend the objective setting date for workers	Workers can navigate to their Performance Management home page to access the objective setting task and complete the task.
Change the topmost supervisor for a plan	The new supervisor can view the plan and plan tasks in the Performance Management home page.
Transfer objectives	Based on the details transferred from source plan to the destination plan, workers can access objectives or appraisals of source plan in the destination plan.

Loss of objectives when you enroll workers into new plans

You can remove a worker from one performance management plan and enroll the same

worker into another performance management plan. When you perform this task, then worker's scorecards of the previous PMP will be lost.

Appraisals

Appraisals Overview

The appraisal process is a key component of the performance management function. During a typical appraisal, you assess a worker's competencies and objectives and identify development opportunities for the next appraisal period. The appraisal provides a snapshot of the worker's achievements and supplies input to related processes, such as training and compensation planning.

Most enterprises conduct appraisals at regular intervals (for example, yearly), primarily to assess competencies and objectives and influence compensation plans. However, you can also use appraisals for other purposes. For example, you can:

- Take a snapshot of worker competencies at the start or end of a project.

- Evaluate worker competencies after an event, such as a retraining exercise, to test its effectiveness.

- Assess worker progress against objectives at intervals during the appraisal period.

- Gather exit information when a worker leaves the enterprise.

- Assess specific competencies for a position or project.

The appraisals function can support all such requirements.

A Collaborative Approach to the Appraisal

In a traditional appraisal, the appraisee's ability to contribute to the appraisal is limited. The manager or appraiser completes most of the appraisal and may invite the appraisee to comment at the end of the process.

Performance Management challenges the traditional approach by making the appraisal the product of collaboration between the main appraiser and the appraisee. The main appraiser *shares* the appraisal with the appraisee to allow the appraisee to view or update the appraisal. If the main appraiser also transfers ownership of the appraisal to the appraisee (which is optional unless the appraisee is to update the appraisal) the appraisee *shares* the appraisal with the main appraiser to return ownership. This sharing of the appraisal between main appraiser and appraisee can occur as often as necessary during a single appraisal process.

See: The Appraisal Process, page 1-158

Appraisal Participants

Appraisals can involve the following types of participants:

- The main appraiser, usually the appraisee's manager, who controls the appraisal process.

- Appraisers, who can contribute to all sections of the appraisal.

- Reviewers, who can view others' evaluations and enter overall comments. They cannot update other sections of the appraisal.

- Other participants, who contribute to 360-degree appraisals only. They complete questionnaires about the appraisee's performance, for example, and can enter overall comments, but can neither view nor update the rest of an appraisal. Other participants are typically peers or subordinates of the appraisee to whom you do not want to reveal the appraisal contents.

- The appraisee, the subject of the appraisal, who can view or update those sections of the appraisal shared with them by the main appraiser. An appraisee who is the appraisal initiator can complete any section before sharing the appraisal with the main appraiser. Thereafter, the main appraiser controls the appraisee's access to the appraisal.

Employees and contingent workers can perform all appraisal roles.

Appraisal Types

Performance Management supports three appraisal types:

- Standard appraisal

- 360-degree appraisal

- Self appraisal

Standard Appraisal

As its name suggests, the standard appraisal supports most appraisal requirements. The format of the appraisal depends on configuration choices you make, mostly in the *appraisal template*.

See: The Appraisal Template, page 1-187

The standard appraisal can include the following sections:

- **Competencies**

  In the Competencies section, you evaluate the appraisee's proficiency in measurable

skills. To include competencies in an appraisal, you must identify a *competency assessment template* in the appraisal template. Otherwise, no Competencies section appears in the appraisal.

Managers and workers can use star ratings to rate performance and proficiency levels for competencies in appraisals. See: Using Star Ratings to Rate Performance and Proficiency Levels, page 1-165

See: Assessment Templates, page 1-192 and Assessing Competencies and Objectives, page 1-196

- **Competency Gaps**

  In the Competency Gaps section, you can view the difference between an appraisee's current competency levels and those required by their job or position. This section appears in the appraisal only if you explicitly include it by personalizing the relevant SSHR pages; it does not appear by default.

- **Objectives**

  In the Objectives section, you assess objectives allocated to the appraisee for the current appraisal period. To include objectives in an appraisal, you must identify an *objective assessment template* in the appraisal template. Otherwise, no Objectives section appears in the appraisal.

  See: Assessment Templates, page 1-192 and Assessing Competencies and Objectives, page 1-196

  > **Note:** If you use appraisal templates created using the forms-based interface, the Objectives section appears in the appraisal by default.

  While setting objectives for an appraisal created using the Appraisal function, you can copy previous objectives that are incomplete.

  When you set objectives for a performance management plan appraisal, you can copy objectives from the Objectives Library. You can also copy shared objectives or previous objectives that are incomplete.

- **Learning Path**

  In the Learning Path section, you can identify training courses for the appraisee and specify target dates. You can use this section only if you also use Oracle Learning Management (OLM), and it appears in the appraisal only if you explicitly include it by selecting Include Learning Path in the appraisal template; it does not appear by default.

  See: The Appraisal Template, page 1-187

- **Participants**

  In the Participants section, you identify appraisers and reviewers to participate in

this appraisal. For a standard appraisal, you cannot identify other participants. This section appears in the appraisal by default.

- **Questionnaires**

  You can include appraisee and main appraiser questionnaires in the appraisal. Appraisers can complete the questionnaire you identify for the appraisee. Alternatively, you can select a different questionnaire when you include each appraiser in the appraisal. This section appears in the appraisal only if you select Include Questionnaires in the appraisal template.

  See: The Appraisal Template, page 1-187

  > **Note:** If you use appraisal templates created using the forms-based interface, the main appraiser does not have a different questionnaire from the appraisee.

360-Degree Appraisal

The 360-degree appraisal, also known as a *group appraisal*, is one to which an appraisee's peers, managers, and reporting staff can all contribute. It differs from the standard appraisal in one respect only: other participants can contribute to a 360-degree appraisal, but not to a standard appraisal. Appraisers and other participants can complete the appraisee questionnaire. Alternatively, you can select a different questionnaire when you include each appraiser and other participant in the appraisal.

The 360-degree appraisal can include the same sections as the standard appraisal.

Self Appraisal

Some enterprises encourage their workers to perform regular self appraisals as a way of monitoring their own progress. No one else can view or contribute to a self appraisal. The self appraisal can include the same sections as the standard appraisal, except the Participants section.

Completing the Appraisals Offline

Using the Download or Upload Appraisals functionality, main appraisers, appraisees, and other participants can complete specific sections of the appraisal offline. They can download the contents of an appraisal, update the contents while disconnected from the network, and then later upload their changes when they reconnect to the application.

See: Downloading and Uploading Appraisals, page 1-170

> **Note:** Appraisal participants can download the appraisals only if the Offline Appraisals feature is enabled. To enable the appraisal participants to complete the appraisals offline, the HR Professional

must select an offline appraisal template for each appraisal participant type (main appraiser, appraisee, and other participant) in the Offline Appraisal Template Details region.

Updating the Competency Profile

A competency profile is a record of a worker's competencies showing their proficiency level in each competency. You create the competency profile using the forms-based interface, and you can maintain the competency profile using either the forms-based interface or the SSHR Competency Profile function. Alternatively, if you set the profile option Apply Assessment Competencies to Person to Yes, or select Update Competency Profile in the appraisal template, the application automatically updates the appraisee's competency profile to include revised competency levels when the appraisal is complete.

Appraisals of Terminated Workers

HR Professionals and main appraisers can view and update appraisals of ex-employees and ex-contingent workers based on the business requirements of an enterprise.

See: Updating Appraisals of Terminated Workers, page 1-168

Reporting and Analysis

Discoverer workbooks enable you to analyze appraisal activity for an organization hierarchy or supervisor hierarchy:

- Worksheets in the Appraisal Detail workbook provide information about multiple ongoing and completed appraisals, including appraisee name, appraisal duration, and final ratings.

  See: Appraisal Detail Workbook, page 1-208

- Worksheets in the Competence Updates after Appraisal workbook enable you to view competency updates made manually or automatically when an appraisal is complete.

  See: Competency Updates after Appraisal Workbook, *Oracle HRMS Strategic Reporting (HRMSi) User Guide*

The Appraisal Process

This topic describes the standard and 360-degree appraisal process. For:

- A general introduction to appraisals, see Appraisals Overview, page 1-154

- A description of the appraisal setup tasks, see Setting Up the Appraisal Process, page 1-183

- A description of a typical appraisal process, see An Example Appraisal Process, page 1-173

To participate in an appraisal and view completed appraisals, you use Oracle SSHR.

Initiating the Appraisal

If you use the Performance Management function, you can define a Performance Management Plan (PMP) to create appraisals automatically on a specified date for all members of the plan. Appraisals created in this way identify either the main appraiser or the appraisee as the initiator of the appraisal. Performance Management allocates the appraisal automatically to the specified initiator.

See: Performance Management Plans, page 1-73

Alternatively, either the main appraiser (usually a manager) or the appraisee can initiate a standard or 360-degree appraisal using the self-service Appraisals function.

Whether the application creates appraisals automatically or individuals create them using the Appraisals function, control of the appraisal depends on who is the initiator:

- A main appraiser who is the appraisal initiator controls its progress from the start. That is, the main appraiser decides when to share the appraisal with the appraisee, which information to share with the appraisee, whether to transfer appraisal ownership to the appraisee, and whether the appraisee can update the appraisal and provide feedback.

- An appraisee who is the appraisal initiator controls its progress until first sharing the appraisal with the main appraiser. The appraisee shares the whole appraisal with the main appraiser and cannot conceal particular sections. Thereafter, the main appraiser controls the progress of the appraisal, exactly as if the main appraiser were the initiator.

Managers log in as employees to initiate appraisals of themselves (self appraisals).

Ownership of the Appraisal

Either the main appraiser or the appraisee owns the appraisal. The main appraiser transfers ownership by *sharing* the appraisal with the appraisee and leaving Main Appraiser Retains Ownership deselected. The appraisee transfers ownership by *sharing* the appraisal with the main appraiser.

When the main appraiser owns the appraisal, the appraisee:

- Cannot update the appraisal

- Can view the appraisal *up to the last sharing point*

  Any changes the main appraiser makes to an in-progress appraisal after resuming ownership are not visible to the appraisee until the main appraiser shares the appraisal again.

When the appraisee owns the appraisal, the main appraiser:

- Cannot update the appraisal

- Can see all sections of the appraisal, and can view any changes the appraisee has made since resuming ownership

Ownership can transfer between the main appraiser and the appraisee as often as necessary during a single appraisal.

> **Note:** When a main appraiser shares an appraisal with an appraisee after selecting the Participant Details check box, the participant feedback, if any, is visible to the appraisee only after the main appraiser completes the appraisal and provides the final rating.

Sharing Appraisals Without Transferring Ownership

If the main appraiser deselects Update Appraisal when sharing an appraisal with the appraisee, the appraisee cannot update the appraisal; however, by default, ownership of the appraisal still transfers to the appraisee. The appraisee must share the appraisal with the main appraiser to return ownership.

To enable the appraisee to view the appraisal but not gain ownership of it, the main appraiser selects Main Appraiser Retains Ownership. In this case, the main appraiser can continue to update the appraisal, and the appraisee does not need to share the appraisal in return.

Main Appraiser Retains Ownership appears only for appraisals whose status is Ongoing.

Updating Worker Objectives

When workers create objectives and add objectives' details, their managers can update the objectives and objectives' details. Your enterprise has the flexibility to determine whether managers can update the objectives and objectives' details added by workers using the HR: Allow Updates to Objective Details Added by Appraisee profile option.

Using Star Ratings to Rate Performance and Proficiency Levels

Managers and workers can use star ratings to rate performance and proficiency levels for competencies in appraisals. See: Using Star Ratings to Rate Performance and Proficiency Levels, page 1-165

How Appraisers, Reviewers, and Other Participants Contribute to the Appraisal

Participants in an appraisal (appraisers, reviewers, and other participants) do not own the appraisal. While the main appraiser owns the appraisal, all participants can update the appraisal. However, while the appraisee owns the appraisal, only other participants can update it; appraisers and reviewers cannot update the appraisal. Appraisers and reviewers automatically regain their access to the appraisal when the appraisee shares it with the main appraiser again.

When the main appraiser requests feedback, participants receive workflow notifications. Each participant makes their contribution to the appraisal independently of the other participants. Participants can see changes made to the sections to which they have access, including those made after the main appraiser requests their feedback, until they apply their contribution. At that point, their view of the appraisal is frozen. They can make further updates only if the main appraiser requests feedback again. Participant feedback is visible to the appraisee only after the main appraiser completes the appraisal and provides the final rating.

> **Note:** When participants complete their contribution to the appraisal, their participation status (as shown in each participant's notification table) is Complete. However, the appraisal remains in their notification tables until the appraisal itself is complete.

Deleting Participants and Changing Participant Roles

You can delete a participant from an appraisal or change their role (for example, you can change an appraiser to a reviewer), provided the participant has not yet given feedback.

Adding Journal Entries

Using the Journal feature, managers and workers can track key accomplishments, performance details, or training requirements as they happen or at the end of an appraisal cycle. They can use the journal information during appraisal creation . Journals are secure and private, and are visible only to people who create them.

When managers or workers click the Journal icon for an appraisal, the Add Attachment page appears. On this page, you can attach a file, provide a text description, or provide the location of the directory in which you saved the journal document.

An Add Attachment window appears when you move the mouse over the Journal icon. You can also add attachments using this window.

Using Employee Self-Service to View Performance Details

Workers can log in to their Employee Self-Service responsibility and view their

performance details from the My Information link. The Performance tabbed region displays information about completed performance appraisals such as performance rating, next review date, and main appraiser. The review date that is shown for an appraisal is the date when the appraisal review actually took place and is not the appraisal date.

Completing the Appraisals Offline

Using the Download button, main appraisers, appraisees, and other participants can complete specific sections of the appraisal offline. They can download the contents of an appraisal, update the contents while disconnected from the network, and then later upload their changes when they reconnect to the application.

See: Downloading and Uploading Appraisals, page 1-170

> **Note:** Managers and HR Professionals cannot download a terminated appraisee's appraisal and update it offline.

Changing the Main Appraiser

When the main appraiser is the initiator of an appraisal, that person's name appears by default in the Main Appraiser field on the Setup Details page of the appraisal. When the appraisee is the initiator of an appraisal, the name of that person's manager appears by default in the Main Appraiser field. In either case, the appraisal initiator can select a different main appraiser on the Setup Details page.

As main appraiser, you can select a different main appraiser by clicking Change Main Appraiser once the appraisal is in progress. If you do this after entering setup details but before completing other sections of the appraisal, you cease to be a participant in the appraisal and can neither view nor update it unless the new main appraiser explicitly requests your feedback. If you change main appraiser after completing a section of the appraisal (for example, the competency ratings), you remain listed as a participant and your contribution is retained. However, your view of the appraisal as a participant is frozen, and you can make no further changes unless the new main appraiser explicitly requests further feedback.

You can change the main appraiser for:

• Appraisals that you create using the Appraisals function

• Appraisals that you create as part of performance management plans.

You can use the change main appraiser feature, for example, when a manager in your hierarchy plans to leave your enterprise during the appraisal cycle and you need to complete appraisals of workers who report to that manager. Click the View Appraisals in People Hierarchy button, select the appraisals of workers, and change the main appraiser.

The Printable Page Function

From the Appraisal Review page, you can click Printable Page to display the complete appraisal, with all sections expanded, in a separate window. You use standard browser functionality to print or save a copy of the appraisal. Alternatively, you can keep this window open for reference while you continue to work on the appraisal.

> **Note:** The view of the appraisal that appears in the Printable Page window depends on your role in the appraisal. For example, the main appraiser sees the complete appraisal, whereas the appraisee's version is likely to exclude some sections.

Printing In Progress and Completed Appraisals

Managers and workers can print in progress or completed appraisals. Depending on business requirements, your system administrator can display either the Print or Print All column. You can view the Print or Print All columns in the Appraisals In Progress and Completed Appraisals tables.

- Print: When you click the Print icon, the Configure Print Options for Printable Page appears where you can select either form or table layout and the required appraisals sections to print. See: Printing Appraisals, page 1-172

- Print All: You can open or save the appraisal in PDF format. The application prints the complete appraisal as per the permissions in the appraisal template.

Accessing Final Ratings

When the appraisal process is complete, the application automatically writes the appraisee's final rating to the Rating field in the Performance window, which you can access from the Assignment window. You can set up Compensation Workbench to access the Rating field value.

See: Setting Up Compensation Workbench Plans, *Oracle HRMS Compensation and Benefits Management Guide*

Accessing Completed Appraisals

The Appraisals home page lists completed appraisals in which you have participated. For example, for an employee, the My Appraisals tab lists completed appraisals of that employee. For a manager, the Main Appraiser tab lists completed appraisals for which the manager has been main appraiser. You can specify filter values, such as appraisal purpose and appraisee, to locate particular completed appraisals in the list.

> **Note:** When you tab out of a field in the Search region that has an associated Search window, that window does not open automatically. Click the Search icon to display the Search window.

Note that your role determines your view of a completed appraisal. For example, appraisees see only information they have entered and any section shared with them by the main appraiser.

Using the View Appraisals in People Hierarchy function on the Appraisals home page, a main appraiser can also view in-progress and completed appraisals of any appraisee to whom their security profile gives them access. For example, as a manager you can view appraisals of workers who report to you, even if you have not participated in their appraisals in any role.

The Appraisee's View of Appraisals

An appraisal appears in the appraisee's Appraisals home page if:

- The application creates the appraisal automatically from a PMP that identifies the appraisee as the initiator.

- The appraisee initiates the appraisal.

- The main appraiser transfers the appraisal to the appraisee.

- The main appraiser requests the appraisee's feedback on the overall rating.

An appraisal remains in the appraisee's Appraisals home page only until the appraisee next shares the appraisal with the main appraiser.

> **Note:** If the main appraiser has transferred the appraisal to the appraisee without transferring ownership, the appraisal remains visible to the appraisee up to the sharing point; the appraisee does not need to return the appraisal to the main appraiser.

Self Appraisal

To perform a self appraisal, you log into self-service as an employee (even if you are a manager). A self appraisal involves only the employee, and there is no approval process.

When you submit a self appraisal, its status is Completed. If you want to update a self appraisal at intervals (for example, throughout the year), use the Save as Draft function to keep the appraisal in progress rather than submitting the appraisal.

You can delete self appraisals at any time and regardless of their status.

Impact of Plan Administration Tasks

When the performance management plan administrator reopens an appraisal, the following changes occur:

- The appraisal status changes to Ongoing and the ownership moves to the main appraiser.

- Main appraisers can edit the appraisal by adding competencies, objectives and share with appraisee.

Deleting Appraisals

HR Professionals or managers cannot delete appraisals of terminated employees created using the Appraisal function.

To manage the Appraisal process, enterprises can create performance management plans with the Appraisals feature only. For appraisals created as part of the WPM plans, administrators can remove scorecards of terminated employees from plans. For information on removing scorecards, see: Performance-Management Plan Administration Tasks, page 1-142

Access Enwisen from Info Online

If your enterprise enables the Info Online content container, then you access the web site of Enwisen, a third-party information provider. Click the Handbook link to access information, for example, your company's information on performance appraisals.

Key Concepts

See:

- Viewing Appraisals, page 1-167

- Updating Appraisals of Terminated Workers, page 1-168

- Approving Appraisals, page 1-170

Using Star Ratings to Rate Performance and Proficiency Levels

Managers and workers can use star ratings to rate performance and proficiency levels in competencies. The star rating component is available for Competency Profile and Appraisals. In Appraisals (both appraisals created using the Appraisals function and performance-management plan appraisals), the star rating component is displayed in the Competencies region.

To use the star rating component, enterprises can set the 'HR: Enable Star Rating for Performance and Proficiency Levels in Competencies' profile option. See: Profile Options in Oracle Performance Management, page 1-22

Star Ratings in Appraisals

If your enterprise uses the star rating component, then managers and workers can use and view star ratings for proficiency and performance rating scales in the Competencies region of appraisals (both appraisals created using the Appraisals function and performance-management plan appraisals).

> **Note:** The ' Current Proficiency Level' in the Competency Profile function alone supports the star rating component. In the Appraisals function the 'Current Proficiency Level' does not support the star rating component.

When you print appraisals, if the star rating component is in use, then the proficiency and performance rating scales in the Competencies region of appraisals display star ratings.

Star Ratings in the Competency Profile

Managers and workers can use star ratings in the following pages and regions of the Competency Profile:

- Current Competencies

- Correct Competencies

- Enter New Levels

- Proposed Changes table

- Competency History

- Add Competencies page

- Competency Profile: Review

- Competencies Awaiting Approval

In the All Actions Awaiting Your Attention function, the star rating component is displayed for approvers, when a Competency Profile transaction is submitted for approval.

Viewing Appraisals

Viewing Appraisals

Employees and managers can view the following appraisals:

- The Appraisals In Progress table displays both the standard and 360-degree appraisals created using the Appraisals function.

- The Performance Management Plan Appraisals In Progress table displays appraisals created as part of the workforce performance management (WPM) plans. You can search for WPM appraisals using the Plan Name search criteria.

Managers can view appraisals of workers in their hierarchy. On the Appraisals: People in Hierarchy page, when a manager moves the mouse over the Details icon, the Latest Appraisal Information pop-up window appears. Managers can view appraisal information such as the main appraiser, appraisal date, overall rating, and appraisal status along with employment and contact details. If an appraisee deletes an appraisal, then the appraisal Status that you view on the Latest Appraisal Information pop-up window is Deleted.

When appraisal participants view an appraisal, the initial appraisal page that the application displays is different, for example, the initial page can be either the Appraisal Overview page or Appraisal Review page. This behavior is based on whether a main appraiser is the initiator of an appraisal or the appraisal is initiated by an appraisee or an appraiser.

Viewing Total Competency Scores

- Main appraisers can view the total competency score on the following pages:

    - Give Final Ratings: Main Appraiser and Give Final Ratings: Review pages for an ongoing appraisal. These pages display only the objectives total score and not the competency total score.

    - Appraisal Review page for a completed appraisal. This page displays both objectives total score and competency total score.

- Appraisees can view the total competency score on the following pages:

    - Update Standard Appraisal: Review page. This page displays both competency and objective total scores.

    - Appraisal Review page for a completed appraisal. This page displays both competency and objective total scores.

Viewing Appraisals of Workers who Transfer into a Manager's Hierarchy

When an employee or a contingent worker is transferred to another business group or is terminated in one business group and rehired in another business group, HR Professionals or main appraisers of the new business group can view the previously completed appraisal of the worker from the earlier business group. For example, John Smith, a manager in Vision Canada business group completes his mid-year appraisal in December 2009 and is rehired as a consultant in Vision Corporation business group in February 2010. Alex James, John's manager and main appraiser in the Vision Corporation business group can view John's mid-year appraisal that he completed when he was in Vision Canada business group. Employees can view their previously completed appraisals after they move in to another business group.

> **Note:** To use this feature, the HR: Display Completed Appraisal from Other Business Groups profile option must be set to Yes.

Viewing Appraisals of Terminated Workers

If the enterprise decides to display appraisals of terminated workers, then main appraisers can view appraisals of ex-employees and ex-contingent workers that are at the Saved, Planned, Transferred, or Ongoing status. The Appraisals In Progress and Performance Management Plan Appraisals In Progress tables display these appraisals. An icon indicates terminated workers in the Appraisee column to identify terminated workers easily.

Main appraisers can delete appraisals of ex-employees or ex-contingent workers using the Appraisals as Main Appraiser page.

Viewing Completed Appraisals of Terminated Workers

Main appraisers can view the completed appraisals of ex-employees and ex-contingent workers, if the Terminated Workers tab is available on the Appraisals As Main Appraiser page. These appraisals can be either appraisals created using the Appraisals function or performance-management plan appraisals.

Updating Appraisals of Terminated Workers

This topic provides information on updating appraisals of terminated workers.

Updating Appraisals of Ex-Employees or Ex-Contingent Workers

Oracle Performance Management provides a configurable option in the appraisal template that enables main appraisers to update appraisals (appraisals created using the Appraisals function and performance-management plan appraisals) of ex-employees and ex-contingent workers.

Main appraisers can update appraisals of terminated workers only if the last standard process date is available for workers. The appraisal of a terminated worker is open for update to a main appraiser until the worker's final process date and is unavailable after the final process date.

> **Note:** The ability to update and complete appraisals of terminated workers after the final process date is available to an HR Professional only. To meet legislative requirements, an HR Professional can update or complete the appraisal of a terminated worker after the worker's final process date. However, the HR Professional can update the appraisal of a terminated worker after the worker's final process date, only if there is a benefits assignment associated with the worker's record. In such cases, the HR Professional can search for the worker record using the First Name and Last Name fields as there is no assignment number for such an assignment. If the terminated worker has no benefits assignment, then the HR Professional cannot update the appraisal of such a worker beyond the final process date.

If an HR Professional defines the configurable options to enable updates to appraisals of terminated workers, then a main appraiser can:

- Update the appraisals of terminated workers that are at the Saved, Planned, Transferred, or Ongoing status in the Appraisals as Main Appraiser page regions: Appraisals In Progress and Performance Management Plan Appraisals In Progress. The main appraiser can update and complete all sections of an ex-employee's or ex-contingent worker's appraisal.

  > **Note:** The main appraiser can update an appraisal, if it is at the Transferred status and the main appraiser retains ownership of the appraisal. The main appraiser cannot update an appraisal of a terminated worker, if it is at the Transferred status, with 'Update Appraisal' permission granted to the appraisee. In such a scenario, the HR Professional can use the Switch as a Manager feature, search, and update the appraisal. Only the HR Professional can view and update appraisals of terminated workers that are at the Pending Approval status.

Updating Appraisals of Workers with Future-Dated Termination

Based on enterprise requirements, appraisees, main appraisers, or HR professionals can access and update appraisals of workers whose termination date is set to a future date. These appraisals can be appraisals created using the Appraisals function or performance-management plan appraisals.

Approving Appraisals

This topic provides information about approving appraisals.

Appraisal Approval

You can implement your enterprise's approval process for appraisals using the standard SSHR approvals functionality.

When main appraisers give final ratings, they can add approvers and specify their position in the approvals chain. They can also attach supporting documents. If the Save Attachments check box is available in the Attachments region, then they can select this option to make these attachments available in the Oracle HRMS People window.

Each approver receives a workflow notification requesting their approval when the previous approver in the chain has approved. When the final approver has approved the appraisal, the main appraiser receives a workflow notification.

> **Note:** Appraisals do not appear in an approver's Appraisals home page unless the approver is also an appraisal participant. Approvers can access the appraisal details from the notification message.

Any approver who disagrees with the appraisal can return it to the main appraiser for correction. The main appraiser can then update the appraisal and resubmit it to all approvers.

When an approver rejects an appraisal, irrespective of whether the appraisal is initiated by the Main Appraiser or the Appraisee, the main appraiser receives the rejected appraisal. The main appraiser can view the rejected notification in the In-Progress table. The application changes the appraisal status to Ongoing and the main appraiser can update the appraisal and must share it with the appraiser to complete the appraisal process.

When you send the appraisal to approvers, you can also request the appraisee's feedback on the overall rating. In this case, the appraisee receives a request for feedback when all approvers have approved the appraisal. At the same time, the main appraiser receives a notification that the appraisee's feedback has been requested. When the appraisee provides feedback, the main appraiser receives a further notification, and the appraisal process is complete.

Downloading and Uploading Appraisals

Oracle Performance Management gives main appraisers, appraisees, and other participants the flexibility to download in-progress appraisals, update appraisals without being connected to the application (away from the workplace, for example), and upload them later. The appraisal participants can benefit from this feature as it

gives them time and privacy to complete either their own or other workers' appraisals.

Your role determines the appraisals that you can download and update offline from the following pages:

- My Appraisals page for employees

- Appraisals as Main Appraiser for managers

- Appraisals As Participant for other participants

As main appraisers and appraisees, you must own the appraisals to work on the appraisals offline. Other participants can work on the appraisals offline when their Participation Status is Open.

> **Note:** Of the three appraisal participant types, only other participants can complete the appraisals offline.

Appraisal Sections for Offline Completion

You can download sections of the appraisal that do not require a connection to the application and that require time for completion.

- If you are assessing a manager or a worker, then you can perform the following appraisal tasks offline:

  - Update competencies

  - Update and add objectives

  - Complete the questionnaire

  - Provide an overall rating and comments

    For managers, you can work on the advancement potential section.

- If you have the role of other participant contributing to 360-degree appraisals, you can complete questionnaires about the appraisee's performance and provide overall feedback offline.

How the Download and the Upload Process Works

Managers, appraisers, and other participants can download more than one appraisal at a time. Employees can download their own current appraisal and any other appraisals for which they are an other participant.

Appraisal participants can select to download a single appraisal by clicking the Download icon. The application downloads the appraisal in a Microsoft Excel file. You

can select multiple appraisals and click the Download button to download multiple appraisals. If you select to download more than one appraisal, then the single zip file contains all of the Microsoft Excel appraisal worksheets.

The file name of the appraisal worksheet contains the appraisee's name and the appraisal date. To work on the appraisal, appraisal participants must extract the zip file to their local PC. After they complete the required appraisal they can upload the Excel worksheet. If you are uploading multiple appraisal worksheets, then you upload them one at a time. The application automatically updates the online appraisal with the latest details.

You can update the online appraisal even if you have already downloaded that appraisal. When you try to update an appraisal that you downloaded, the application displays a warning message that you have already downloaded the appraisal. You can either ignore the upload and continue to work on the online appraisal, or you can upload the appraisal and update it online.

Printing Appraisals

This topic explains how to use the Configure Print Options for Printable page. This page appears when managers or workers click the Print column icon in the Appraisals In Progress and Completed Appraisals tables in Main Appraiser and My Appraisals page. Use this page to print appraisals in the Adobe Acrobat PDF format.

Managers and workers can use this page to select form layout or table layout as print output and select required sections of the appraisal to print. Within the required sections, they have the option to further select specific information to be printed. The application checks whether the Competency Template, Objective Template and Questionnaire Template are attached to the Appraisal Template when loading this page. In case any region is not attached, then that region will not appear in the page Configure Print Options for Printable Page. In addition, while loading the page for a worker, the application checks for the permissions available to the worker and the permitted options will be displayed in the options page. Permissions are granted by the manager for Questionnaire Information, Objective Ratings, Competency Ratings, Participant Ratings, Participant Names and Participant Details while sharing the appraisal with the worker.

Selecting the Print Layout Option

You can select any one of the following layout options:

• Form Layout: Presents objectives and competency details in continuous text format.

• Table Layout: Presents objectives and competency details in a tabular format.

Printing the Appraisal Sections

The appraisal sections that you can view are based on the appraisal template attached to the appraisal. The following is a list of sections that the application provides by default:

- Include Setup Details

- Include Competency Details

  When you print appraisals, if the star rating component is in use, then the proficiency and performance rating scales in the Competencies region of appraisals display star ratings. See: Using Star Ratings to Rate Performance and Proficiency Levels, page 1-165

- Include Objective Details

- Include Questionnaire

- Include Advancement Potential (only for Main Appraiser)

- Include Learning Path

When you select Competency Details, Objective Details, or Include Questionnaire check boxes, you can further select specific details or fields in these regions that you would like to print. You can view the description of each of the selected fields that you would like to print. From the Available Details column move the competency and objective details to the Selected Details column to print in the appraisal.

The application generates a print version of the appraisal in the Adobe Acrobat PDF version when you click Print. You can open the printed appraisal or save it to your local machine.

An Example Appraisal Process

This example process describes a standard appraisal created automatically from a Performance Management Plan (PMP). The main appraiser is identified as the appraisal initiator. The flow described here is typical; however, the appraisals functionality is flexible enough to accommodate different process flows from the one described here.

Initiating the Appraisal

Performance Management created the appraisal automatically on the date specified in the PMP and allocated it to you as main appraiser. You:

1. Log in to Manager Self Service and select the Performance Management function.

    Your Performance Management Task List includes the task Manage Appraisals,

which is enabled during the appraisal-task period.

2. You select the Manage Appraisals task, and then select the Appraise action for the first appraisee.

The appraisal template used in this example includes all available sections.

Performing a Standard Appraisal

1. In the Appraisals Overview page, you complete the following regions:

   - The Competencies region, which already includes job competencies as specified in the competency assessment template. You add other competencies for this employee, and enter your evaluation of all competencies.

   - The Objectives region, which includes objectives to be appraised from the employee's personal scorecard. You enter a performance rating for each objective.

   - The Learning Path region, where you enter courses the appraisee should attend and specify target completion dates.

   - The Questionnaire region, where you complete the questionnaire identified for the main appraiser in the appraisal template.

   You decide not to complete the Participants and Overall Rating and Comments regions at this point and save the appraisal as a draft to review the Competencies and Objectives regions.

2. When you have time to work on the competencies and objectives, you download the appraisal using the Download button. You update the details of the competencies, add and update the objectives, and then upload the completed appraisal.

3. You share the appraisal with the appraisee. You decide to share:

   - Your competency ratings and comments

   - Your objective ratings and comments

   You decide not to share your completed questionnaire. In addition, you do not select Overall Rating and Overall Comments because you have not yet completed these entries. The appraisee can see the Learner Path region by default.

   To allow the appraisee to update the appraisal, you select Update Appraisal in the Appraisee Permissions region. You do not select Participant Details. Provide Feedback on Overall Rating is not selectable because you have not selected Overall Rating.

While the appraisee owns the appraisal, you can view the appraisal but not update it.

4. The appraisee adds their own competency and objective ratings, completes the appraisee questionnaire, and then shares the appraisal with you.

5. You review the appraisee's contributions, amend one of your own competency evaluations, and include an additional objective in the Objectives region. You also add participants to the appraisal.

6. You share the appraisal with the appraisee again. On this occasion, you select:

   • Competency Ratings and Comments, so the appraisee can view your amendment

   • Participant Details, so the appraisee can review and update the list of participants

   • Update Appraisal, so the appraisee can update the appraisal (specifically, the list of participants)

     Note: If you deselect Update Appraisal, the appraisee can view the information you are sharing but cannot update it. However, the appraisee can still provide feedback if you select Provide Feedback on Overall Rating.

   You leave Main Appraiser Retains Ownership deselected because, to update the appraisal, the appraisee must own it.

     Note: If you select Main Appraiser Retains Ownership, the appraisee can view any information you share but can neither update the appraisal nor provide feedback on the overall rating.

   As you did not select Objective Ratings and Comments, the appraisee can see the list of objectives, including the objective you added in Step 4, but cannot see any of your objective ratings and comments.

   While the appraisee owns the appraisal, you can view the appraisal but not update it.

7. The appraisee updates the list of participants and shares the appraisal with you again.

8. You review the revised list of participants. You remove one of the appraisers and make another a reviewer rather than an appraiser.

9. You share the appraisal with the appraisee, but this time you select Main Appraiser

Retains Ownership so that you can continue to work on the appraisal. The appraisee can view latest changes but cannot make further updates.

10. You request the participants' feedback.

11. As you receive notification that participants have contributed to the appraisal, you review their contributions and make any further changes to the appraisal.

12. When all participants have contributed and you have no further changes to make, you are ready to discuss the appraisal with the appraisee. You use the Employee Review function to schedule a review meeting.

    See: Entering an Employee Review, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

    You use the appraisals Printable Page function to print the appraisal to take to the meeting.

    Main appraisers and appraisees can print in progress and completed appraisals from the Main Appraiser and My Appraisals pages. See: Printing Appraisals, page 1-172

13. After the review meeting, you give final ratings and request approval. In the Details to be Shared with Appraisee region of the Final Ratings page, you select:

    • Additional Details, so that the appraisee can see latest changes to those sections of the appraisal to which the appraisee already has access

    • Overall Comments

    • Overall Rating

    • Provide Feedback on Overall Rating, so that the appraisee can comment

    You decide not to share participant names and ratings.

14. Each approver in the approvals chain receives notification when their approval is required. One approver returns the appraisal for correction.

15. You update the appraisal to address their concerns and send the appraisal to all approvers and recipients again.

    This time, all approvers approve the appraisal.

16. The appraisee receives a request for feedback on their overall rating. The appraisee reviews the sections of the appraisal you have allowed them to see, including the overall rating and comments, and provides feedback.

    The appraisal process is now complete.

For a summary of the appraisals workflow notification messages, see: Appraisals

Appraisals Workflow Notifications

This topic provides a summary of workflow notifications, organized by appraisal role, specific to standard or 360-degree appraisals. For notifications you generate, it identifies the action that generates the notification, who receives it, and how it affects your access to the appraisal. For notifications you receive, it identifies the message subject and any actions you need to take.

Main Appraiser

Notifications the Main Appraiser Generates

Action	Notification Sent To	Effect on Appraisal Access
Share With Appraisee and Transfer Appraisal Ownership	Appraisee	You continue to view all parts of the appraisal, but cannot update it until the appraisee shares the appraisal with you again.
Share With Appraisee and Retain Appraisal Ownership	Appraisee	You can continue to update all sections of the appraisal.
Change Main Appraiser	New Main Appraiser	If you change main appraiser after entering setup details but before completing other sections of the appraisal, you cease to be a participant in the appraisal and can neither view nor update it. If you change main appraiser after completing some sections of the appraisal, you remain listed as an appraiser, and any information you enter is retained. However, you can make no further changes to the appraisal. In either case, you can view the appraisal if your security profile gives you access to the appraisee.

Action	Notification Sent To	Effect on Appraisal Access
Request Feedback	Participants (Appraisers, Reviewers, Other Participants)	Your access to the appraisal is unaffected.
Add Approvers and Recipients	Approvers and Recipients	You can view but not update the appraisal.

Notifications the Main Appraiser Receives

Notification Message	Action
The appraisal of *appraisee* needs your attention as main appraiser.	Review and update the appraisal.
You have been selected as main appraiser for the appraisal of *appraisee*.	Continue the appraisal.
Participant has completed their appraisal of *appraisee*.	Review the participant's contribution.
Appraisal for *appraisee* has been approved.	No action required.
Appraisal for *appraisee* has been approved and is pending appraisee feedback.	No action required.
Appraisee *appraisee* has provided feedback on appraisal.	Review the appraisee feedback.

Appraisee

> **Note:** The main appraiser determines the appraisee's view of an appraisal. For example, if the main appraiser shares competency comments and ratings with the appraisee, the appraisee can view those items. Otherwise, they are not visible to the appraisee.

Notifications the Appraisee Generates

Action	Notification Sent To	Effect on Appraisal Access
Share with Main Appraiser	Main Appraiser	You can access your view of the appraisal up to latest the sharing point. You cannot update the appraisal again until the main appraiser shares the appraisal with you and allows you to update it.

Notifications the Appraisee Receives

Notification Message	Action
Your appraisal has been transferred to you.	Review the appraisal, make any permitted updates, and share the appraisal with the main appraiser.
View latest details of your appraisal.	Review the appraisal. You cannot update the appraisal and do not need to share the appraisal with the main appraiser.
Your appraisal has been completed.	No action required.
Your appraisal has been completed. Please review and provide feedback	Click Details on the Appraisals tab, review the appraisal, then click Share with Main Appraiser. Enter your comments in the Feedback field.

Appraiser

Notifications the Appraiser Generates

Action	Notification Sent To	Effect on Appraisal Access
Complete	Main Appraiser	Your access to the appraisal is frozen: you can see anything you could see before you entered your contribution and clicked Complete, but nothing entered after that point. You can make no further updates unless the main appraiser notifies you again.

Notifications the Appraiser Receives

Notification Message	Action
The appraisal of *appraisee* needs your attention as appraiser.	Update the appraisal to provide your input. Note that you can update the appraisal only while the main appraiser owns it. While the appraisee owns the appraisal, only other participants can update it.

Reviewer

Notifications the Reviewer Generates

Action	Notification Sent To	Effect on Appraisal Access
Complete	Main Appraiser	Your access to the appraisal is frozen: you can see anything you could see before you entered your contribution and clicked Complete, but nothing entered after that point. You can make no further updates unless the main appraiser notifies you again.

Notifications the Reviewer Receives

Notification Message	Action
The appraisal of *appraisee* needs your attention as reviewer.	Review the appraisal and enter your comments. Note that you can update the appraisal only while the main appraiser owns it. While the appraisee owns the appraisal, only other participants can update it.

Other Participant

Other participants are involved in 360-degree appraisals only.

Notifications the Other Participant Generates

Action	Notification Sent To	Effect on Appraisal Access
Complete	Main Appraiser	Your access to the appraisal is frozen: you can see the questionnaire you completed and the comments you entered, but can make no further updates unless the main appraiser notifies you again.

Notifications the Other Participant Receives

Notification Message	Action
The appraisal of *appraisee* needs your attention as other participant.	Complete the questionnaire and provide overall comments.

HR Professional

When the HR Professional completes updating an appraisal, Oracle Performance Management notifies appropriate recipients. The main appraiser receives notification when the HR Professional transfers the terminated worker's appraisal or completes the worker's appraisal. If a main appraiser is terminated and the HR Professional changes the main appraiser, the appraisee receives a notification to review the appraisal.

Notifications the HR Professional Generates

Notification Message	Notification Sent To	Effect on Appraisal Access
HR_APPRAISAL_COMP_MGR_MSG:&HRPROFNAME has completed &APPRAISEE's appraisal. Review the appraisal.	Main Appraiser	No action required.

Notification Message	Notification Sent To	Effect on Appraisal Access
HR_APPRAISAL_COMPLET E_MSG:&HRPROFNAME has completed your appraisal. Review the appraisal.	Appraisee	No action required.
HR_APPRAISAL_FEEDBAC K_MSG:&HRPROFNAME has completed your appraisal. Review the appraisal and provide your feedback.	Appraisee	Review the appraisal and provide feedback.
HR_APPRAISAL_MACHAN GE_MSG: &HRPROFNAME has changed the main appraiser of your appraisal. Review the appraisal.	Appraisee	Review and update the appraisal.

Setting Up the Appraisal Process

This topic brings together several tasks that affect the appraisal process. You may already have performed some of these tasks during implementation of Oracle Performance Management.

To set up the appraisal process:

1. During an appraisal, Performance Management can allocate a rating to each objective and competency based on standard calculations. Alternatively, you can define your own formulas to calculate objective and competency ratings.

   See: Assessing Competencies and Objectives, page 1-196

2. To include competencies in an appraisal, create one or more competency assessment templates. HR Professionals and other authorized users create competency assessment templates using the Manage Competency Assessment Templates function.

   See: Assessment Templates, page 1-192

3. To include objectives in an appraisal, create one or more objective assessment templates. HR Professionals and other authorized users can create objective assessment templates using the Manage Objective Assessment Templates function.

   See: Assessment Templates, page 1-192

4. For rating overall performance, identify an existing performance rating scale or create a new performance rating scale. You select this rating scale when you define the appraisal template.

See: Defining Rating Scales, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Alternatively, you can write a formula to calculate a final rating based on a worker's final scores for competencies and objectives. (In this case, you select both a rating scale and a formula when you define the appraisal template.)

See: Assessing Competencies and Objectives, page 1-196

5. Identify or create questionnaires to include in the appraisal. If you omit this step, you cannot select questionnaires for the appraisee and main appraiser when you define the appraisal template. For 360-degree appraisals, you must define a questionnaire.

See: The Appraisal Template, page 1-187

6. Create an appraisal template to configure the appraisal. You must create at least one appraisal template, and you can create several if you want to use a different template for each appraisal type or purpose.

To create the appraisal template, HR Professionals and other authorized users use the Manage Appraisal Templates function.

- To enable main appraisers to update and complete appraisals of ex-employees and ex-contingent workers, you can define the configurable options available in the appraisal template.

- If you are using the Offline Appraisals feature, then the appraisal template must contain the offline appraisal templates for enabling the offline capabilities.

  If you personalize the online Appraisal pages for the appraisal participant types, and you plan to use the offline appraisals functionality, then you must personalize the offline appraisal templates to match those of the online appraisals. Oracle Performance Management supplies the offline appraisal templates that contain fields and sections similar to those that appear on the online appraisals.

  Oracle Performance Management supplies these templates:

  - For the appraisee -OfflApprSeedEmpTemplate

  - For the main appraiser -OfflApprSeedMgrTemplate

  - For an other participant - OfflApprSeedPartTemplate

  Use Oracle XML Publisher to personalize the XML version of the templates. For more information, see: *Oracle XML Publisher User's Guide* and *Offline Appraisal*

Template Personalization Guidelines, an Oracle White paper on My Oracle Support Note ID:465183.1.

See: The Appraisal Template, page 1-187

7. Review current settings of the profile options, and update if necessary:

   See: Configuring the Appraisals Function, page 1-24

8. Edit the APPRAISAL_TYPE lookup to include your enterprise's appraisal types. The values you specify here populate the Appraisal Purpose list on the SSHR Appraisal Setup page.

   See: Adding Lookup Types and Values, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

9. If appropriate, edit the APPRAISAL_ASSESSMENT_STATUS lookup to update the appraisal status values.

   See: Adding Lookup Types and Values, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

10. When an appraisal is complete, the application automatically updates the following fields in the Performance window:

    • Rating

       This field contains the appraisee's overall rating.

    • Date

       This field contains the appraisal completion date.

    • Type

       This field contains the interview type with the code APPRAISAL from the EMP_INTERVIEW_TYPE lookup. To ensure that Oracle Performance Management populates the Type field, you must update the lookup EMP_INTERVIEW_TYPE.

       See: Adding Lookup Types and Values, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

11. When you create a new appraisal using the self-service Appraisals function, you select an appraisal template in the Appraisal Setup Details page. You can personalize the Appraisal Setup Details page for each type of appraisal to identify a default appraisal template.

    See: Configuring the Appraisals Function, page 1-28

12. A manager can view all appraisals for an individual in a people hierarchy. By

default, the people hierarchy excludes ex-employees. To include appraisals of ex-employees, you edit the relevant function.

See: Configuring the Appraisals Function, page 1-28

13. Configure components of the Appraisals pages, such as flexfields, instruction text, and messages. In addition, you can include or exclude specific regions of the pages.

See: Configuring the Appraisals Function, page 1-28

> **Note:** You can use function-level personalization to personalize the entire appraisal process under a single function.
>
> See: The Personalization Framework, *Oracle SSHR Deploy Self-Service Capability Guide*

14. Define your approvals process for appraisals.

See: The *Workflow* section in Configuring the Appraisals Function, page 1-28

You are now ready to perform an appraisal.

See: The Appraisal Process, page 1-158

Appraisal and Assessment Templates

The Appraisal Template

The appraisal template is the design document for an appraisal. Its main function is to configure all sections of the appraisal to suit the appraisal purpose or enterprise requirements: you can use a single appraisal template throughout the enterprise.

Creating an Appraisal Template

To create an appraisal template, you use the Manage Appraisal Templates function. You can access this function from the HR Professional menu, where it appears by default.

You can define as many appraisal templates as you need to meet enterprise requirements. For example, you could define a different template for each Performance Management Plan or different templates for each appraisal purpose (such as annual appraisal, exit appraisal, or benchmarking appraisal). Alternatively, you can use a single appraisal template for all appraisals.

> **Note:** You can continue to use appraisal templates created in the Appraisal Template window of the forms-based interface. However, their scope is local only. To update or delete these templates, use the Manage Appraisal Templates function.

In the Search region of the Manage Appraisal Templates function, you can search for existing templates created using either this function or the Appraisal Template window. When you tab out of a field in the Search region that has an associated Search window, that window does not open automatically. Click the Search icon to display the Search window.

Configuring the Appraisal

When you create an appraisal template, you can:

- Specify validity dates. Outside these dates, the template is not available for use. You can use these dates to associate the template with a performance-management period, for example.

- Specify the template scope. Global templates are available in all enterprise business groups. Local templates are available only in the business group in which you create them.

  If the appraisal template has global scope, any assessment templates,

questionnaires, and rating scales that you include in the template must also have global scope. If the appraisal template has local scope, any assessment templates and questionnaires that you include in the template must be local to the same business group as the appraisal template. Rating scales, however, can be either global or local.

> **Note:** To enable HR Professionals to view and update overall ratings, you must ensure that a performance rating scale is attached to the appraisal template.

- Include instructions to appraisal participants. These instructions appear, formatted as you specify, on the Appraisal Overview page.

Assessing Competencies and Objectives

To assess competencies during an appraisal, you must select or create a competency assessment template in the appraisal template. Otherwise, the Competencies region does not appear in appraisals. The Update Competency Profile option, which determines whether the application updates competency profiles automatically after the appraisal, appears after you identify a competency assessment template.

To assess objectives during an appraisal, you must select or create an objective assessment template in the appraisal template. Otherwise, the Objectives region does not appear in appraisals.

See: Assessment Templates, page 1-192

To allocate a final rating to the appraisee, you select a performance-rating scale. In addition, you can select an Appraisal Total Score Formula to identify the appropriate final rating from the selected performance-rating scale. The formula, which you write, can base any calculations on the worker's total scores for competencies and objectives. The rating identified by the formula appears as the worker's Suggested Overall Rating on the Final Ratings page of the appraisal. HRMS supplies some example formulas for calculating the appraisal total score.

See: Assessing Competencies and Objectives, page 1-196

See: Writing Formulas for Rating Competencies and Objectives, *Oracle HRMS FastFormula User Guide*

Including the Learning Path Region

In the Learning Path region of an appraisal, you can identify training courses for the appraisee. You select the Include Learning Path option to include the region in appraisals.

Setting the Appraisal Sharing Options

When main appraisers share appraisals with appraisees, they specify which information the appraisee can view and whether the appraisee can update the appraisal. For example, to share competency ratings and comments, the main appraiser selects the Competency Ratings and Comments check box. By default, no sharing option is selected, but you can change this initial setting for appraisals that use this template. The main appraiser can override these initial appraisal-sharing options in appraisals that use the template.

Including Questionnaires

You can attach appraisee and main appraiser questionnaires to the appraisal template.

The appraisee questionnaire is available to the appraisee, appraisers, and other participants. When you add appraisers and other participants to an appraisal, you can select either Default Questionnaire (which is the appraisee questionnaire) or a different questionnaire.

The main appraiser has no default questionnaire. If you want the main appraiser to complete a questionnaire, you must select it explicitly. You can select the same questionnaire for both the main appraiser and the appraisee.

To create a questionnaire, you use the Questionnaire Administration function.

Questionnaire Scope

To include the same questionnaire in all appraisals in enterprises that use multiple business groups, define the questionnaire with global scope. Otherwise, questionnaires are available only in the business group in which you create them.

Publication Status of Questionnaires

Any questionnaire that you attach to an appraisal template must have the status Published. You can publish a questionnaire either when you create it or at a later date (after review of the questionnaire, for example).

You can change the status of a questionnaire from Published to Unpublished at any time, even if the questionnaire is currently in use in appraisals or simply attached to an appraisal template. This feature enables you to prevent future use of a questionnaire. For example, if you create a different questionnaire for each year's appraisals, you can prevent next year's appraisals from using this year's questionnaire by setting its status to Unpublished.

Enabling Main Appraisers to Update Appraisals of Terminated Workers

Prerequisite: Before you configure the steps on enabling main appraisers to update appraisals of terminated workers, ensure that the *pEnableTerms* parameter value is set to

Y for the following Appraisals functions. By default, the parameter value is set to Y.

- Manager: Main Appraiser Page (HR_MGR_MN_APPR_SS)

- Manager: Performance Management Page (HR_MGR_TALMGMT_SS)

The application checks for the parameter settings and then applies the configuration options to enable main appraisers to update appraisals of terminated workers.

When creating an appraisal template, you can define whether main appraisers can update appraisals of terminated workers.

When you select the Allow Updates to Appraisals of Terminated Workers check box, the View and Update Appraisals of Terminated Workers region appears. To enable main appraisers to update appraisals of ex-employees or ex-contingent workers, select the relevant check box. You can enter the number of days from when main appraisers can view *completed* appraisals of terminated workers in the Terminated Workers tab of the Appraisals As Main Appraiser page. The Number of Days field is based on the appraisal period end date. For example, if you enter 365 in the Number of Days field, the application displays all such terminated worker appraisals that have their appraisal period end date within the last 365 days.

The ability to update ongoing appraisals is controlled by the setting of the Display and update appraisals of employees and Display and update appraisals of contingent workers check boxes.

The following section explains the changes if you select the Display and update appraisals of employees and Display and update appraisals of contingent workers check boxes.

A main appraiser can update the appraisals of terminated workers that are at the Ongoing status in the Appraisals as Main Appraiser page regions: Appraisals In Progress and Performance Management Plan Appraisals In Progress. The main appraiser can update and complete all sections of an ex-employee's or ex-contingent worker's appraisal. An icon to indicate terminated workers is available in the Appraisee columns of the tables to identify terminated workers easily. Note that only the HR Professional can view and update appraisals of terminated workers that are at the Pending Approval status.

Enabling Update of Appraisals of Workers with Future-Dated Termination

Select the Allow Updates to Appraisals of Workers Terminated at a Future Date check box to enable workers and main appraisers, to access and update appraisals of workers whose termination date is set to a future date.

If you do not select this check box, then in a supervisor hierarchy, the Mass Appraisal Creation process fails for a manager with future dated termination and the manager's immediate direct reports. However, the process creates appraisals for the manager's indirect reports.

This example explains how the Mass Appraisal Creation process works if the check box

is not selected.

Jo Woodworth's Supervisor Hierarchy
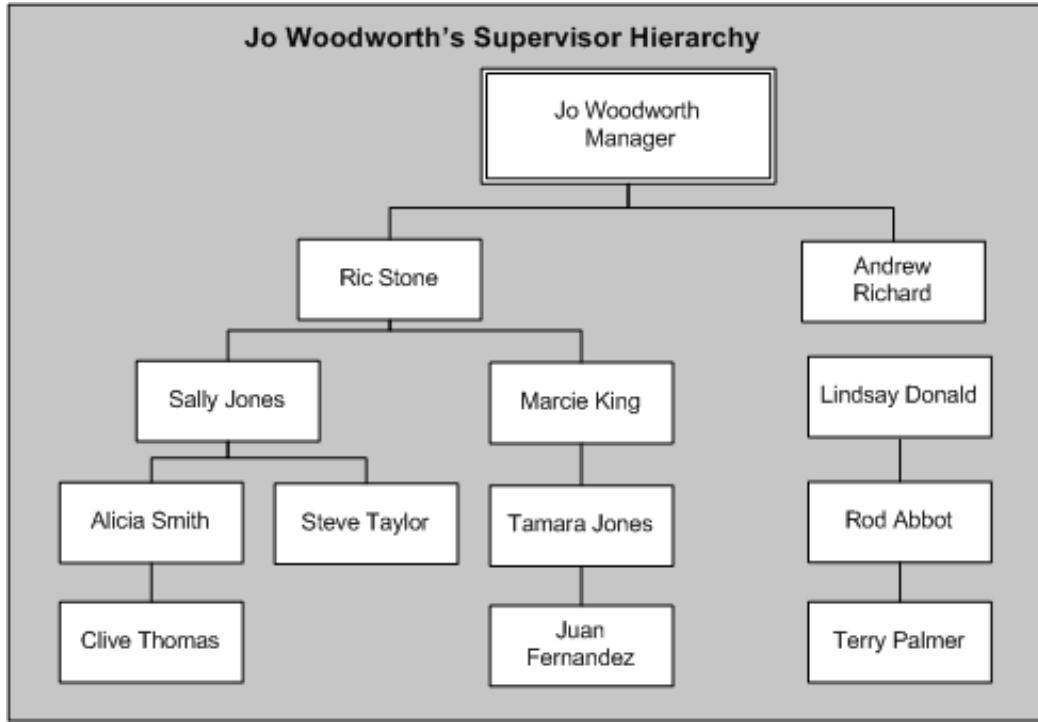
Ric Stone who reports to Jo Woodworth has decided to leave the enterprise and Ric's employee record has a termination date set at a future date. If you do not select the check box, then when the Mass Appraisal Creation process runs, the process:

- Does not create appraisals for Ric and his immediate directs: Sally and Marcie.

- Creates appraisals for Ric's indirect reports: Alicia, Steve, Clive, Tamara, and Juan.

Selecting the Offline Appraisal Templates for the Appraisal Participants

To enable the appraisal participants to complete the appraisals offline, you must select an offline appraisal template for each appraisal participant type (main appraiser, appraisee, and other participant) in the Offline Appraisal Template Details region.

> **Note:** If your enterprise does not use this feature, then you can hide the Offline Appraisal Template Details region using personalization.

Updating an Appraisal Template

This topic discusses information related to updating appraisal templates.

After publishing a performance-management plan, can I make changes to the appraisal template, for example, add or change the Objectives and Competencies Templates?

You can update an appraisal template included in a performance-management plan, provided that the appraisal cycle has not started in your enterprise. You can modify the appraisal template and republish the performance management plan for the changes to take effect. If your plan includes appraisals, ensure you run the Mass Appraisal Creation concurrent process so that the latest appraisal template is available

When can I delete or update an appraisal template?

It is advisable to update or delete an appraisal template ideally before the appraisal cycle begins in your enterprise. If you make any changes to the template after even one appraisal is created, the evaluation process that your enterprise follows will be impacted. For example, you use an appraisal template 'Annual Appraisal Template-2010' to assess the competency and objective ratings of workers. Later, you change the Competency template in the appraisal template: Annual Appraisal Template-2010'. You will find that the competencies in the completed appraisals of workers who used the appraisal template 'Annual Appraisal Template-2010' , are impacted.

I have created an appraisal template and the template is associated with the appraisal process. Can I delete the appraisal template?

You cannot delete an appraisal template that is associated with the appraisal process. The Delete button appears as read-only.

Can I update an appraisal template that is associated with an appraisal process?

You can update an appraisal template that is associated with an appraisal process. However, certain restrictions apply to the changes that you can make to the template. If an appraisal template is used to create at least one appraisal and then if you change either appraisee or main appraiser questionnaire template, then all the appraisals that are created become incomplete. The questionnaires section will be missing in the appraisals. So, you cannot change the questionnaire template after appraisal template is used to create an appraisal. It is advisable to update an appraisal template ideally before the appraisal cycle begins in your enterprise. If you make any changes to the template after even one appraisal is created, the appraisal process that your enterprise follows may be impacted.

Assessment Templates

To assess competencies and objectives during an appraisal, you must include a competency assessment template and an objective assessment template in the appraisal template. You design competency assessment templates and objective assessment

templates to meet enterprise requirements.

Competency Assessment Templates

The competency assessment template specifies how to assess competencies in appraisals. When you create a competency assessment template, you can:

- Specify validity dates. Outside these dates, you cannot use the template. These dates must not conflict with the validity dates of the appraisal template in which the competency assessment template appears. For example, if the appraisal template has no valid-to date, the competency assessment template must have no valid-to date.

- Specify the template scope. Global templates are available in all enterprise business groups. Local templates are available only in the business group in which you create them. The scope must match the scope of any appraisal template in which the competency assessment template appears.

- Include instructions to participants. These instructions appear, formatted as you specify, in the Competencies region of the Appraisal Overview page.

- Identify competencies that you want to assess. For example, you can include competencies required by a worker's job in the appraisal. Selections that you make in the competency assessment template apply to all users of the template. However, during the appraisal you can tailor the Competencies region to suit the appraisee.

> **Note:** You can delete job competencies from a worker's appraisal, but you cannot delete from an appraisal other competencies that appear in the competency assessment template.

Selecting a Rating Scale Type for Competencies

To specify how HRMS will calculate scores for individual competencies, you select a rating scale type. HRMS can calculate scores based on performance, proficiency, or both. In addition, HRMS can apply a weighting value to either performance or proficiency.

Alternatively, you can select Fast-Formula-Based Line Scoring and enter a formula name. The selected formula calculates a score for each competency using specified performance, proficiency, and weighting values. HRMS supplies sample formulas for calculating competency scores; you can also define your own.

See: Assessing Competencies and Objectives, page 1-196

See: Writing Formulas for Rating Competencies and Objectives, *Oracle HRMS FastFormula User Guide*

Whether you use a formula or one of the standard HRMS calculation methods, you

specify whether the total competency score is the average or the sum of all competency ratings.

The score for each competency (the line score) and the total competency score appear in the Final Ratings page of the appraisal.

Creating Competency Assessment Templates

To create a competency assessment template, you use the Manage Competency Templates function. You can access this function from:

- The HR Professional menu, where it appears by default

- The Manage Appraisal Templates function, when you click Create Competency Template

  In this case, the competency assessment template has the same name and validity dates as the appraisal template.

You define as many competency assessment templates as you need to meet enterprise requirements. For example, you could tailor competency assessment templates to jobs, positions, or even individuals. Alternatively, you could define an assessment template for your enterprise's core competencies, and the main appraiser or appraisee can include additional competencies, such as those appropriate to a job or an individual, during the appraisal. You can even define a competency assessment template that contains no competencies; in this case, the main appraiser or appraisee includes all relevant competencies during the appraisal.

> **Note:** You can continue to use competency assessment templates created in the Assessment Template window of the forms-based interface. However, their scope is local only. To update or delete these templates, use the Manage Competency Templates function.

Objective Assessment Templates

The objective assessment template specifies how to assess objectives in appraisals. When you create an objective assessment template, you can:

- Specify validity dates. Outside these dates, you cannot use the template. These dates must not conflict with the validity dates of the appraisal template in which the objective assessment template appears. For example, if the appraisal template has no valid-to date, the objective assessment template must have no valid-to date.

- Specify the template scope. Global templates are available in all enterprise business groups. Local templates are available only in the business group in which you create them. The scope must match the scope of any appraisal template in which the objective assessment template appears.

- Include instructions to participants. These instructions appear, formatted as you specify, in the Objectives section of the appraisal.

For appraisals created automatically, the application copies the worker's personal scorecard of objectives to the Objectives region of the appraisal. Otherwise, the main appraiser and appraisee populate the Objectives region during the appraisal.

Selecting a Rating Scale Type for Objectives

To specify how HRMS will calculate scores for objectives, you select a rating scale type. You can select a performance scale, from which users select a rating for each objective. If the objective's definition includes a weighting value, HRMS multiplies performance by weighting to give a score for each objective. Otherwise the performance rating is the objective score.

Alternatively, you can select Fast-Formula-Based Line Scoring and enter the name of a formula to calculate a score for each objective. HRMS supplies sample formulas for calculating objective scores; you can also define your own.

See: Assessing Competencies and Objectives, page 1-196

See: Writing Formulas for Rating Competencies and Objectives, *Oracle HRMS FastFormula User Guide*

Whether you use a formula or select a performance scale, you specify whether the total objectives score is the average or the sum of all objective ratings.

The score for each objective (the line score) and the total objective score appear in the Final Ratings page of the appraisal.

Creating Objective Assessment Templates

To create an objective assessment template, you use the Manage Objective Templates function. You can access this function from:

- The HR Professional menu, where it appears by default

- The Manage Appraisal Templates function, when you click Create Objective Template

  In this case, the objective assessment template has the same name and validity dates as the appraisal template.

You define as many objective assessment templates as you need to meet enterprise requirements. For example, if you use a different formula to calculate objective scores for each job or position, you define multiple objective assessment templates. You may also want to define a different objective assessment template for each performance-management period.

Managing Existing Templates

In the Search region of the Manage Competency Templates and Manage Objective Templates pages, you can search for existing templates created using either these functions or the Assessment Template window. When you tab out of a field in the Search region that has an associated Search window, that window does not open automatically. Click the Search icon to display the Search window.

Assessing Competencies and Objectives

During an appraisal, each participant can allocate ratings to individual competencies and objectives to indicate a worker's level of achievement. The main appraiser can also allocate an overall rating to a worker's performance for the appraisal period.

Assessing Competencies

When you define a competency, you specify how you will measure a worker's proficiency in that competency. You can:

- Specify proficiency levels that are unique to the competency.

- Select a general proficiency-rating scale.

Managers and workers can use star ratings to rate performance and proficiency levels for competencies in appraisals. See: Using Star Ratings to Rate Performance and Proficiency Levels, page 1-165

See: Competency Measurement, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

The competency assessment template defines how you will assess a worker's competencies during an appraisal. You can assess:

- Proficiency only

- Performance only

- Both proficiency and performance

You can also apply a weighting value to either proficiency or performance. The competency assessment template identifies any performance and weighting scales you will use.

The application calculates a score for each competency (a competency line score) and a total score for all competencies. These scores appear in the Competency Ratings region of the Final Ratings page of the appraisal.

To calculate competency line scores, the application can use one of the following standard calculations:

Rating-Scale Type	Score Derived From:
Performance	Performance
Proficiency	Proficiency
Performance and Proficiency	Proficiency multiplied by Performance
Performance and Proficiency, Weighting for Performance	Performance multiplied by Weighting
Performance and Proficiency, Weighting for Proficiency	Proficiency multiplied by Weighting
Performance with Weighting	Performance multiplied by Weighting
Proficiency with Weighting	Proficiency multiplied by Weighting

For example, if you select the rating-scale type "Performance and Proficiency, Weighting for Performance," the application multiplies performance by weighting to produce the competency line score.

As an alternative to the standard calculations, you can select Fast-Formula-Based Line Scoring and identify a formula in the competency assessment template to calculate competency line scores.

See: Writing Formulas for Rating Competencies and Objectives, *Oracle HRMS FastFormula User Guide*

See: Assessment Templates, page 1-192

The total score for all competencies can be either the average or the sum of the competency line scores. For the following example, the total score can be either 18 (if you select Sum) or 6 (if you select Average).

Competency	Competency Line Score
Competency 1	4
Competency 2	4
Competency 3	10

Competency Ratings in an Appraisal

To rate competencies, enterprises can use a performance rating scale or a combination of Performance, Proficiency and Weighting rating scales. When enterprises use the delivered Appraisal function, main appraisers can rate the performance of a worker for specific competencies in the Competencies region of the Appraisals Overview page. On the Give Final Ratings page, managers can rate workers' new proficiency levels for their competencies based on their performance.

Competency Line Scores Calculation

If you select the rating-scale type Fast-Formula-Based Line Scoring and select one of the supplied sample formulas (such as PERF_X_WEIGHTING), the calculation that the application performs to produce a competency line score differs from the calculation it performs when you select one of the standard rating-scale types (for example, Performance with Weighting). In some cases, this variation in the calculation may produce slightly different results for identical data.

To illustrate the differences that the calculation method can produce, consider the example competency Develop Leadership Skills. For this competency, the participants' ratings are as follows:

Participant	Proficiency	Performance	Weighting
1	4	3	3
2	4	4	3
3	3	2	2

If You Select Fast-Formula-Based Line Scoring

If you select the rating-scale type Fast-Formula-Based Line Scoring and the formula PERF_X_WEIGHTING in the Competency Assessment Template, the application:

1. Calculates the average weighting for the competency by dividing the total of the weighting values (8, in this example) by the number of participants (3).

2. Calculates the average performance rating for the competency by dividing the total of the performance scores (9, in this example) by the number of participants (3).

3. Multiplies the average weighting by the average performance rating (for example, (8 / 3) * 3 = 8). The result of this calculation (8, in this example) is the competency line score (the appraisee's rating) for the competency Develop Leadership Skills.

If You Do Not Select Fast-Formula-Based Line Scoring

If you select a rating-scale type other than Fast-Formula-Based Line Scoring (for this example, Performance with Weighting) in the Competency Assessment Template, the application:

1. Multiplies performance by weighting to produce each participant's competency line score. For the example competency Develop Leadership Skills, the results are:

   • Participant 1 = 9

   • Participant 2 = 12

   • Participant 3 = 4

2. Sums the participants' competency line scores to produce a total score for the competency (for example, 9 + 12 + 4 = 25).

3. Divides the total score by the number of participants to produce the average score (for example, 25 / 3 = 8.33). The result of this calculation (8.33) is the competency line score (the appraisee's rating) for the competency Develop Leadership Skills.

As you can see from these examples, the results produced by each approach may not be identical, even though the assessment data is identical and the type of calculation (performance multiplied by weighting) is the same in both cases. Therefore, to ensure consistent results, you are recommended to use only one of these two approaches for any group of employees whose results you need to compare.

Assessing Objectives

During an appraisal, the application calculates a score for each objective and a total score for all objectives. These scores appear in the Objective Ratings region of the Final Ratings page of the appraisal.

How Performance Management produces the objective line score (the score for an individual objective) depends on the rating-scale type you select in the objective-assessment template. If you select Performance and identify a performance scale, the application calculates the average of all participants' performance ratings for the objective to produce the objective line score. If you select Fast-Formula-Based Line Scoring, how the application calculates the objective line score depends on the formula you select. Possible inputs to the formula are each participant's performance rating and any weighting value included in the objective's definition. HRMS supplies two sample formulas, and you can also provide your own.

See: Writing Formulas for Rating Competencies and Objectives, *Oracle HRMS FastFormula User Guide*

See: Assessment Templates, page 1-192

The total score for all objectives can be either the average or the sum of the individual scores. For the following example, the total score can be either 12 (if you select Sum) or 3 (if you select Average).

Objective	Objective Line Score
Objective 1	4
Objective 2	3
Objective 3	3
Objective 4	2

Producing a Combined Score for Objectives and Competencies

In the appraisal template, you can select a formula for calculating a combined score for competencies and objectives. Inputs to the formula are the total scores for objectives and competencies. The output from the formula is a rating level ID that identifies a rating level in the final-rating scale named in the appraisal template. The application displays the associated rating level as the appraisee's suggested overall rating in the Overall Rating and Comments region of the appraisal Final Ratings page.

See: Writing Formulas for Rating Competencies and Objectives, *Oracle HRMS FastFormula User Guide*

See: The Appraisal Template, page 1-187

Viewing Appraisal Templates

Note: You cannot use the Appraisal Template window to create new appraisal templates or update existing appraisal templates. Instead, you use the Manage Appraisal Templates function.

See: The Appraisal Template, page 1-187

You can view appraisal templates in the Appraisal Template window, provided that you created them in this window. You cannot use this window to view templates created using the Manage Appraisal Templates function.

To view an appraisal template:

1.   From the View menu, select Query By Example, then select Enter.

2. Enter search values, such as the complete or partial name of an appraisal template.

3. From the View menu, select Query By Example, then select Run. Scroll through the results if the search returns multiple appraisal templates.

Viewing Competency Assessment Templates

> **Note:** You cannot use the Assessment Template window to create new assessment templates or update existing assessment templates. Instead, you use the Manage Competency Templates and Manage Objective Templates functions.
>
> See: Assessment Templates, page 1-192

You can view competency assessment templates in the Assessment Template window, provided that you created them in this window. You cannot use this window to view templates created using the Manage Competency Templates or Manage Objective Templates function.

To view an assessment template:

1. From the View menu, select Query By Example, then select Enter.

2. Enter search values, such as the complete or partial name of an assessment template.

3. From the View menu, select Query By Example, then select Run. Scroll through the results if the search returns multiple assessment templates. For any assessment template, the Performance Scale, Weighting Scale, and Competencies buttons are enabled only if the template includes such information. Otherwise, these buttons are disabled.

Questionnaires

Questionnaire Administration

The Questionnaire Administration function available with Oracle Performance Management helps to automate the creation of questionnaires for use in appraisals or surveys. You can use Questionnaires to collect additional information for Talent Management and Performance Management functions, such as competencies. By default, the Questionnaire Administration function is available with the HR Professional responsibility.

Using the Questionnaire Administration page, as an HR Professional, you can:

- Search for existing global questionnaires that are available to all business groups or local questionnaires available to a specific business group. You can search using the questionnaire name or the publication status search criteria.

- Create questionnaires

- Publish questionnaires so that they are available to your workforce, for example, to use in appraisals.

- Unpublish questionnaires if you do not want your workforce to use them.

Users can generate the HTML content of the questionnaires with any external HTML editor.

Creating a Questionnaire

A questionnaire is a set of user defined questions with the ability to record the answers for future analysis. An example of a questionnaire is an employee survey.

On the Create Questionnaire page:

- Provide a unique name to the questionnaire that you are creating.

- Select the Global Questionnaire check box, if the questionnaire is applicable to all business groups in your enterprise. For example, to include the same questionnaire in all appraisals in enterprises that use multiple business groups, define the questionnaire with global scope. A local questionnaire is available only within the business group.

  Note: After saving a questionnaire, you cannot change its scope.

- Enter the questionnaire content in the form of HTML code. You can use either an

HTML editor, for example, Netscape Composer or a text editor, for example, Notepad to create the HTML code. You need to copy and paste the source HTML of the completed questionnaire in the HTML Text box.

You can use formatting options used in any HTML file, for example, bold, color, and font size.

> **Note:** Text fields in questionnaires hold up to 2000 single-byte characters. If users enter or paste text containing multibyte characters, the field limit reduces accordingly. Text is truncated automatically to fit the 2000-byte limit. You cannot make fields on a questionnaire attached to an appraisal template mandatory.

Following are some of the guidelines for creating a questionnaire using the HTML code:

The HTML must have following layout:

<html>

<head>

</head>

<body>

<form>

</form>

</body>

</html>

The HTML code must not contain <Frame>, <Frameset>, <SCRIPT>, <BASE>, <SUBMIT>, <RESET>, <HIDDEN>, and <SPAN> tags. The <Form> tag must have method of post, for example, <form method="POST> to enable data to be collected from the questionnaire when it is submitted. Within the <Form> tags, you can create the inputs you require to hold the questionnaire results. You can collect data using any of the HTML inputs type: text boxes, radio buttons, and check boxes.

- Click Continue when you complete the HTML Text box. The application validates the HTML code and generates an error message if the HTML code is not valid. You can correct the code and resubmit the questionnaire for validation.

Following are some of the troubleshooting tips on text wrapping issues in the HTML code when creating questionnaires:

- Ensure that there is NO nowrap tag in the HTML code. Wrapping of text is controlled by 'nowrap' tag defined in Questionnaire html.

- Place the whole HTML code inside a TABLE tag. For example,

```
<table width="600">

HTML code

HTML code

</table>
```

- Specify the columns with values, which wrap the text for the text input areas. For example, <TEXTAREA ROWS=4 COLS=35 WRAP="Physical">

- For multiple text areas in a single row, make sure that the sum of the column values is less than 80.

- Specify the width of the TD tag for non text input areas so that it also wraps.

- Check the code behavior in different web browsers, preferably with the latest versions.

For more information on the HTML code and troubleshooting tips, see:

Guide to Self-Service Human Resources (SSHR) - Setting Up Questionnaires on My Oracle Support Note: 73471.1

Text Wrapping Issues in Talent/Performance Management on My Oracle Support Note: 559057.1

After validating the HTML code, the application displays the questionnaire and stores it in the database when you click Submit.

Publishing a Questionnaire

When you publish a questionnaire, it is available to other users. You can set the Publication Status to Published when you create or update a questionnaire.

Updating or Deleting a Questionnaire

You can update a questionnaire that is not in use. For example, you cannot update a questionnaire that is already attached to an appraisal template. You cannot delete or update a questionnaire that is in use.

Unpublishing a Questionnaire

You can change the status from Published to Unpublished, even if the questionnaire is currently in use in appraisals or simply attached to an appraisal template to prevent future use of a questionnaire.

Using the Questionnaire Administration - New Functionality

The Questionnaire Administration - New function available with Oracle Performance

Management helps create questionnaires for use in appraisals. By default, the Questionnaire Administration - New function is available with the HR Professional responsibility.

For information on how to use the Questionnaire Administration functionality, see: Questionnaire Administration, page 1-202

Using the Questionnaire Administration page, as an HR Professional, you can:

- Search for existing global questionnaires that are available to all business groups or local questionnaires available to a specific business group. You can search using the questionnaire name or the publication status search criteria.

- Create questionnaires

- Publish questionnaires so that they are available to your workforce, for example, to use in appraisals.

- Unpublish questionnaires if you do not want your workforce to use them.

Prerequisites

The Questionnaire Administration - New model enables administrators to:

1. Create questions that are free text or long text based. Administrators can also create questions where workers can select answers for these questions from lookup values or rating scale. Before creating questionnaires, analyze the requirements of your enterprise and create appropriate lookups and rating scales for questionnaires.

2. Select appropriate instruction message for the questionnaire and instruction message for each question in the questionnaire. Administrators must create instruction messages based on their business requirements. See: Configuring Questionnaire Administration - New, page 1-49

Creating a Questionnaire

A questionnaire is a set of user defined questions with the ability to record the answers for future analysis.

On the Create Questionnaire page:

- Enter a unique name for the questionnaire that you are creating.

- Select an appropriate instruction message for the questionnaire.

- Select the Global Questionnaire check box, if the questionnaire is applicable to all business groups in your enterprise. For example, to include the same questionnaire in all appraisals in enterprises that use multiple business groups, define the questionnaire with global scope. A local questionnaire is available only within the

business group. After saving a questionnaire, you cannot change its scope.

- Click Add Question.

- Enter questions.

- Specify the type of answers that can be entered for questions. You can select from the following options:

  - Drop Down: This answer type enables workers to select a value from the drop down. The answer can be either from a lookup or rating scale. As the answer validation type, select the lookup or rating scale that the application must display for users to select the correct answer.

  - Free text: Workers can answer in detail and the character limit for the answer is 4000 characters. The application displays answer details in a single line.

  - List of Values (LOV): This answer type enables workers to select a value from the list of values. The answer can be either from a lookup or rating scale. As the answer validation type, select the lookup or rating scale that the application must display for users to select the correct answer.

  - Long text: Workers can answer in detail and the character limit for the answer is 4000 characters. The application displays answer details in a text area.

- Select the instruction type based on the question. You can select a type such as Instruction, Long Tip, Short Hint, or Tip.

- Select the instruction message based on the instruction type.

- Reorder the questions, if required.

- Select Yes or No to indicate if the question is mandatory or optional.

- Click Apply to save your questionnaire.

Publishing a Questionnaire

When you publish a questionnaire, it is available to other users. You can set the Publication Status to Published when you create or update a questionnaire.

Updating or Deleting a Questionnaire

You can update a questionnaire that is not in use. You cannot update a questionnaire that is already attached to an appraisal template. You cannot delete or update a questionnaire that is in use.

Unpublishing a Questionnaire

You can change the status from Published to Unpublished, even if the questionnaire is currently in use in appraisals or simply attached to an appraisal template to prevent future use of a questionnaire.

Workforce Intelligence for Performance Management

Appraisal Detail Workbook

This workbook provides the details of a range of appraisals, enabling you to view the participants, dates, and outcomes of multiple appraisals in one place. You can view all appraisals within your business group, target a specific subset of one supervisor's ongoing appraisals, or specify other combinations.

Worksheets

This workbook contains two worksheets:

- Appraisal Detail by Organization Hierarchy

- Appraisal Detail by Supervisor Hierarchy

Appraisal Detail by Organization Hierarchy Worksheet

This worksheet gives details of completed or ongoing appraisals performed on workers in a given organization. Data includes appraisee and appraiser names, dates, durations, and final ratings.

Business Question

What are the details of appraisals performed in my department?

Parameters

You must enter values for five parameters:

- Organization Hierarchy

- Top Organization

- Rollup Organization

- Start Date

- End Date

Appraisal Detail by Supervisor Hierarchy Worksheet

This worksheet gives details of completed or ongoing appraisals performed on workers under a specified supervisor. Data includes appraisee and appraiser names, dates,

durations, and final ratings.

Business Question

What are the details of appraisals performed on my direct and indirect reports?

Parameters

You must enter values for three parameters:

• Supervisor

• Start Date

• End Date

A

Sample Appraisal Scoring Formulas

Sample Appraisal Objective Line-Scoring Formulas

This topic includes the two supplied sample formulas of type Appraisal Objective Line Scoring. When you define an objective assessment template with a rating-scale type of Fast Formula Based Line Scoring, the application uses the formula you select to calculate the score for each objective in the Objectives section of the appraisal.

Sample Formula PERF

This sample formula returns a performance rating derived from a specified performance rating. Business group and legislation code are global (null).

```
/***************************************************************

 *

 * Formula Name : PERF

 *

 * Description  : For an objective appraisal line, this formula

 *                returns Performance.

 *

 * Formula Type : Appraisal Objective Line Scoring

 *

 * Inputs       : 1) performance, number, default required

 *                2) weighting, number, default required

 *                3) line_object_id (objective_id), number, always set

 *                4) appraisal_id, number, always set

 *                5) appr_template_id, number, always set

 *                6) appr_system_type (e.g.. SELF,EMP360,MGR360TRANS),
text, always set

 *                7) appr_type, text

 * Note         : For appraisal_id, appr_template_id, appr_system_type,
appr_type

 *                a) This is an input, not a context

 *                b) No seeded DBIs use this

 * Outputs      : 1) line_score, number

 *

 * Contexts     : Business Group, Assignment, Organization,

 *                Person, Date Earned

 *

 * Example DBIs : ptu_per_person_type, asg_grade, asg_job,

 *                asg_status, asg_type, asg_primary,

 *                asg_position, asg_hours, asg_salary

 *

 ***************************************************************/

/* Defaults for optional inputs and database items */
```

```
DEFAULT FOR performance IS 0

DEFAULT FOR weighting   IS 0

/* Declare formula inputs */

INPUTS ARE  performance(number)

           ,weighting(number)

           ,line_object_id(number)

           ,appraisal_id(number)

           ,appr_template_id(number)

           ,appr_system_type(text)

           ,appr_type(text)

/* Main body of formula */

line_score = performance

/* Return the line score */

RETURN line_score
```

Sample Formula PERF_X_WEIGHTING

This sample formula returns a performance rating derived from a specified performance rating and the weighting value specified for the objective. Business group and legislation code are global (null).

```
/****************************************************************
 *
 * Formula Name : PERF_X_WEIGHTING
 *
 * Description  : For an objective appraisal line, this formula
 *                multiplies Performance and Weighting.
 *
 * Formula Type : Appraisal Objective Line Scoring
 *
 * Inputs       : 1) performance, number, default required
 *                2) weighting, number, default required
 *                3) line_object_id (objective_id), number, always set
 *                4) appraisal_id, number, always set
 *                5) appr_template_id, number, always set
 *                6) appr_system_type (e.g.. SELF,EMP360,MGR360TRANS),
text, always set
 *                7) appr_type, text
 * Note         : For appraisal_id, appr_template_id, appr_system_type,
appr_type
 *                a) This is an input, not a context
 *                b) No seeded DBIs use this
 * Outputs      : 1) line_score, number
 *
 * Contexts     : Business Group, Assignment, Organization,
 *                Person, Date Earned
 *
 * Example DBIs : ptu_per_person_type, asg_grade, asg_job,
 *                asg_status, asg_type, asg_primary,
 *                asg_position, asg_hours, asg_salary
 *
 ****************************************************************/
/* Defaults for optional inputs and database items */
```

```
DEFAULT FOR performance IS 0

DEFAULT FOR weighting   IS 0

/* Declare formula inputs */

INPUTS ARE  performance(number)

            ,weighting(number)

            ,line_object_id(number)

            ,appraisal_id(number)

            ,appr_template_id(number)

            ,appr_system_type(text)

            ,appr_type(text)

/* Main body of formula */

line_score = performance * weighting

/* Return the line score */

RETURN line_score
```

Sample Appraisal Competency Line-Scoring Formulas

This topic includes the three supplied sample formulas of type Appraisal Competency Line Scoring. When you define a competency assessment template with a rating-scale type of Fast Formula Based Line Scoring, the application uses the formula you select to calculate the score for each competency in the Competencies section of the appraisal.

Sample Formula PERF_X_PROF

This sample formula returns a competency rating derived from specified performance and proficiency ratings. Business group and legislation code are global (null).

```
/***************************************************************

 *

 * Formula Name : PERF_X_PROF

 *

 * Description  : For a competency appraisal line, this formula

 *                multiplies Performance and Proficiency.

 *

 * Formula Type : Appraisal Competency Line Scoring

 *

 * Inputs       : 1) performance, number, default required

 *                2) proficiency, number, default required

 *                3) weighting, number, default required

 *                4) line_object_id (competency_id), number, always set

 *                5) appraisal_id, number, always set

 *                6) appr_template_id, number, always set

 *                7) appr_system_type (e.g.. SELF,EMP360,MGR360TRANS),
text, always set

 *                8) appr_type, text

 * Note         : For appraisal_id, appr_template_id, appr_system_type,
appr_type

 *                a) This is an input, not a context

 *                b) No seeded DBIs use this

 * Outputs      : 1) line_score, number

 *

 * Contexts     : Business Group, Assignment, Organization,

 *                Person, Date Earned

 *

 * Example DBIs : ptu_per_person_type, asg_grade, asg_job,

 *                asg_status, asg_type, asg_primary,

 *                asg_position, asg_hours, asg_salary

 *
 ***************************************************************/
```

```
/* Defaults for optional inputs and database items */

DEFAULT FOR performance IS 0

DEFAULT FOR proficiency IS 0

DEFAULT FOR weighting   IS 0


/* Declare formula inputs */

INPUTS ARE  performance(number)

          ,proficiency(number)

          ,weighting(number)

          ,line_object_id(number)

          ,appraisal_id(number)

          ,appr_template_id(number)

          ,appr_system_type(text)

          ,appr_type(text)


/* Main body of formula */

line_score = performance * proficiency

/* Return the line score */

RETURN line_score
```

Sample Formula PERF_X_WEIGHTING

This sample formula returns a competency rating derived from specified performance
and weighting values. Business group and legislation code are global (null).

```
/****************************************************************
 *
 * Formula Name : PERF_X_WEIGHTING
 *
 * Description  : For a competency appraisal line, this formula
 *                multiplies Performance and Weighting.
 *
 * Formula Type : Appraisal Competency Line Scoring
 *
 * Inputs       : 1) performance, number, default required
 *                2) proficiency, number, default required
 *                3) weighting, number, default required
 *                4) line_object_id (competency_id), number, always set
 *                5) appraisal_id, number, always set
 *                6) appr_template_id, number, always set
 *                7) appr_system_type (e.g.. SELF,EMP360,MGR360TRANS),
text, always set
 *                8) appr_type, text
 * Note         : For appraisal_id, appr_template_id, appr_system_type,
appr_type
 *                a) This is an input, not a context
 *                b) No seeded DBIs use this
 * Outputs      : 1) line_score, number
 *
 * Contexts     : Business Group, Assignment, Organization,
 *                Person, Date Earned
 *
 * Example DBIs : ptu_per_person_type, asg_grade, asg_job,
 *                asg_status, asg_type, asg_primary,
 *                asg_position, asg_hours, asg_salary
 ****************************************************************/
/* Defaults for optional inputs and database items */
```

```
DEFAULT FOR performance IS 0

DEFAULT FOR proficiency IS 0

DEFAULT FOR weighting   IS 0


/* Declare formula inputs */

INPUTS ARE  performance(number)

           ,proficiency(number)

           ,weighting(number)

           ,line_object_id(number)

           ,appraisal_id(number)

           ,appr_template_id(number)

           ,appr_system_type(text)

           ,appr_type(text)

/* Main body of formula */

line_score = performance * weighting

/* Return the line score */

RETURN line_score
```

Sample Formula PROF _X_WEIGHTING

This sample formula returns a competency rating derived from specified proficiency
and weighting values. Business group and legislation code are global (null).

```
/****************************************************************
 *
 * Formula Name : PROF_X_WEIGHTING
 *
 * Description  : For a competency appraisal line, this formula
 *                multiplies Proficiency and Weighting.
 *
 * Formula Type : Appraisal Competency Line Scoring
 *
 * Inputs       : 1) performance, number, default required
 *                2) proficiency, number, default required
 *                3) weighting, number, default required
 *                4) line_object_id (competency_id), number, always set
 *                5) appraisal_id, number, always set
 *                6) appr_template_id, number, always set
 *                7) appr_system_type (e.g.. SELF,EMP360,MGR360TRANS),
text, always set
 *                8) appr_type, text
 * Note         : For appraisal_id, appr_template_id, appr_system_type,
appr_type
 *                a) This is an input, not a context
 *                b) No seeded DBIs use this
 * Outputs      : 1) line_score, number
 *
 * Contexts     : Business Group, Assignment, Organization,
 *                Person, Date Earned
 *
 * Example DBIs : ptu_per_person_type, asg_grade, asg_job,
 *                asg_status, asg_type, asg_primary,
 *                asg_position, asg_hours, asg_salary
 ****************************************************************/
/* Defaults for optional inputs and database items */
```

```
           DEFAULT FOR performance IS 0

           DEFAULT FOR proficiency IS 0

           DEFAULT FOR weighting   IS 0


           /* Declare formula inputs */

           INPUTS ARE  performance(number)

                   ,proficiency(number)

                   ,weighting(number)

                   ,line_object_id(number)

                   ,appraisal_id(number)

                   ,appr_template_id(number)

                   ,appr_system_type(text)

                   ,appr_type(text)

           /* Main body of formula */

           line_score = proficiency * weighting

           /* Return the line score */

           RETURN line_score
```

Sample Appraisal Total Scoring Formulas

This topic includes the two supplied formulas of type Appraisal Total Scoring. When you define an appraisal template, you can select an Appraisal Total Score Formula to calculate the appraisee's suggested overall rating using the total scores for competencies and objectives. This total score appears in the Overall Ratings region of the Final Ratings page.

> **Note:** The Appraisal Total Score Formula must return a rating level ID rather than a rating value.

> See: Writing Formulas for Rating Competencies and Objectives, *Oracle HRMS FastFormula User Guide*

Sample Formula SUM_COMP_AND_OBJ

This sample formula adds the final scores for objectives and competencies and uses the result to identify a final rating.

```
/****************************************************************

 *

 * Formula Name : SUM_COMP_AND_OBJ

 *

 * Description  : This sums the competency and objective scores,

 *                and then uses hard-coded bands to calculate

 *                a final rating.

 *

 * Formula Type : Appraisal Total Scoring

 *

 * Inputs       : 1) competency_score, number, always set

 *                2) objective_score, number, always set

 *                3) appraisal_id, number, always set

 *                4) appr_template_id, number, always set

 *                5) appr_system_type (e.g.. SELF,EMP360,MGR360TRANS),
text, always set

 *                6) appr_type, text

 * Note         : For appraisal_id, appr_template_id, appr_system_type,
appr_type

 *                a) This is an input, not a context

 *                b) No seeded DBIs use this

 *

 * Outputs      : 1) final_rating, number

 *

 * Contexts     : Business Group, Assignment, Organization,

 *                Person, Date Earned

 *

 * Example DBIs : ptu_per_person_type, asg_grade, asg_job,

 *                asg_status, asg_type, asg_primary,

 *                asg_position, asg_hours, asg_salary

****************************************************************/

/* Defaults for optional inputs and database items */
```

```
DEFAULT FOR competency_score IS 0

DEFAULT FOR objective_score IS 0


/* Declare formula inputs */

INPUTS ARE  competency_score(number)

          ,objective_score(number)

          ,appraisal_id(number)


/* Main body of formula. */

total_score = competency_score + objective_score


/* Band the total score to give a final rating */

IF total_score < 50 THEN

  final_rating = 1

IF total_score >= 50 AND total_score < 100 THEN

  final_rating = 2

IF total_score >= 100 AND total_score < 150 THEN

  final_rating = 3

IF total_score >= 150 AND total_score < 200 THEN

  final_rating = 4

IF total_score >= 200 THEN

  final_rating = 5


/* Return the final rating */

RETURN final_rating
```

Sample Formula AVG_COMP_AND_OBJ

This sample formula calculates the average of the total scores for objectives and competencies and uses that value to identify a final rating.

```
/***************************************************************
 *
 * Formula Name : AVG_COMP_AND_OBJ
 *
 * Description  : This takes the average of the competency and
 *                objective scores and then uses this to
 *                determine the final rating.
 *
 * Formula Type : Appraisal Total Scoring
 *
 * Inputs       : 1) competency_score, number, always set
 *                2) objective_score, number, always set
 *                3) appraisal_id, number, always set
 *                4) appr_template_id, number, always set
 *                5) appr_system_type (e.g.. SELF,EMP360,MGR360TRANS),
text, always set
 *                6) appr_type, text
 * Note         : For appraisal_id, appr_template_id, appr_system_type,
appr_type
 *                a) This is an input, not a context
 *                b) No seeded DBIs use this
 *
 * Outputs      : 1) final_rating, number
 *
 * Contexts     : Business Group, Assignment, Organization,
 *                Person, Date Earned
 *
 * Example DBIs : ptu_per_person_type, asg_grade, asg_job,
 *                asg_status, asg_type, asg_primary,
 *                asg_position, asg_hours, asg_salary
 ***************************************************************/
/* Defaults for optional inputs and database items */
```

```
DEFAULT FOR competency_score IS 0

DEFAULT FOR objective_score IS 0


/* Declare formula inputs */

INPUTS ARE  competency_score(number)

          ,objective_score(number)

          ,appraisal_id(number)


/* Main body of formula. */

avg_score = (competency_score + objective_score) / 2


/* Convert the average into a final rating */

IF avg_score < 1.5 THEN

  final_rating = 1

IF avg_score >= 1.5 AND avg_score < 2.5 THEN

  final_rating = 2

IF avg_score >= 2.5 AND avg_score < 3.5 THEN

  final_rating = 3

IF avg_score >= 3.5 AND avg_score < 4.5 THEN

  final_rating = 4

IF avg_score >= 4.5 THEN

  final_rating = 5


/* Return the final rating */

RETURN final_rating
```

Glossary

360-Degree Appraisal

Part of the Performance Management Appraisal function and also known as a Group Appraisal. This is an employee appraisal undertaken by managers with participation by reviewers.

Absence

A period of time in which an employee performs no work for the assigned organization.

Absence Case

Two or more absences for the same person that you associate manually because they share a common factor, such as the same underlying cause.

Absence Type

Category of absence, such as medical leave or vacation leave, that you define for use in absence windows.

Accrual

The recognized amount of leave credited to an employee which is accumulated for a particular period.

Accrual Band

A range of values that determines how much paid time off an employee accrues. The values may be years of service, grades, hours worked, or any other factor.

Accrual Period

The unit of time, within an accrual term, in which PTO is accrued. In many plans, the same amount of time is accrued in each accrual period, such as two days per month. In other plans, the amount accrued varies from period to period, or the entitlement for the full accrual term is given as an up front amount at the beginning of the accrual term.

Accrual Plan

See: *PTO Accrual Plan*, page Glossary-30

Accrual Term

The period, such as one year, for which accruals are calculated. In most accrual plans, unused PTO accruals must be carried over or lost at the end of the accrual term. Other plans have a rolling accrual term which is of a certain duration but has no fixed start and end dates.

Action

In AME, an Action is the *Then* part of an Approval Rule that specifies how the application must progress a transaction's approval process in a particular way depending on the conditions met.

Action Type

In AME, an action type is the generic container for specific actions. It enables you to specify the action to take if a transaction meets the condition of an approval rule. The action type, thus, generates the appropriate approvers for a transaction. As an AME administrator you can make particular action types available for specified transaction types.

Activity Rate

The monetary amount or percentage associated with an activity, such as $12.35 per pay period as an employee payroll contribution for medical coverage. Activity rates can apply to participation, eligibility, coverages, contributions, and distributions.

Actual Premium

The per-participant premium an insurance carrier charges the plan sponsor for a given benefit.

Administrative Enrollment

A type of scheduled enrollment caused by a change in plan terms or conditions and resulting in a re-enrollment.

AdvancePay

A process that recalculates the amount to pay an employee in the current period, to make an authorized early payment of amounts that would normally be paid in future payroll periods.

Agency

An external organization that assists an enterprise in their recruitment process. Agencies act on behalf of the candidates to help them search and apply for jobs. They provide candidates to the fill up job openings in an enterprise or sometimes handle the complete placement process for a vacancy.

Agency Candidate

An agency candidate is a person whose profile is created in iRecruitment by a recruiting agency. This profile includes personal and professional information.

Agency User

An external person who belongs to a recruiting agency and accesses iRecruitment to conduct recruiting activities such as creating candidates and applying on behalf of the candidates.

Alert

An email notification that you can set up and define to send a recipient or group of recipients a reminder or warning to perform a certain task or simply a notification to inform the recipient of any important information.

Align

To define a relationship between objectives. Workers can align their own objectives with objectives that other workers have shared with them. Aligned objectives are also known as *supporting objectives*.

AME

Oracle Approvals Management Engine. A highly extensible approvals rules engine that enables organizations implementing Oracle Applications to simply and effectively define business rules that determine who must approve a transaction originating within an application. You can devise simple or complex rules, as your organization requires, which then form part of your overall business flow. A central repository holds all the rules to facilitate management and sharing between business processes.

API

Application Programmatic Interfaces, used to upload data to the Oracle Applications database. APIs handle error checking and ensure that invalid data is not uploaded to the database.

Applicant

An applicant is a person who submits an application for employment to an organization.

Applicability

In HRMS budgeting, a term describing whether a budget reallocation rule pertains to donors or receivers.

Applicant/Candidate Matching Criteria

Matching functionality in the iRecruitment system that systematically identifies which

candidates and applicants possess the skills, knowledge and abilities to be considered for a specific vacancy. The following columns are used for matching:

- Skills

- FT/PT

- Contractor/Employee

- Work at Home

- Job Category

- Distance to Location

- Key Words

- Salary

Apply for a Job

An SSHR function that enables an employee to, apply, search and prepare applications for an internally advertised vacancy.

Appraisal

An appraisal is a process where an employee's work performance is rated and future objectives set.

See also: *Assessment*, page Glossary-5.

Appraisee

The person who is the subject of an appraisal.

Appraiser

A person, usually a manager, who appraises an employee.

Appraising Manager

The person who initiates and performs an Employee-Manager or 360 Degree Appraisal. An appraising manager can create appraisal objectives.

Approval Rule

In AME, a business rule that determines a transaction's approval process. You construct rules using *conditions* and *actions*. For example, you can write a business rule with the conditions that if the total cost of a transaction is less than 1000 USD, and the transaction is for travel expenses, then the action must be to obtain approval from the immediate supervisor of the person triggering the transaction.

Approver Groups

In AME, an approver group is a collection of approvers you define, which you can include as part of actions when you set up your approval rules.

Arrestment

Scottish court order made out for unpaid debts or maintenance payments.

See also: *Court Order* , page Glossary-12

Assessment

An information gathering exercise, from one or many sources, to evaluate a person's ability to do a job.

See also: *Appraisal*, page Glossary-4.

Assignment

A worker's assignment identifies their role within a business group. The assignment is made up of a number of assignment components. Of these, organization is mandatory, and payroll is required (for employees only) for payment purposes.

Assignment Number

A number that uniquely identifies a worker's assignment. A worker with multiple assignments has multiple assignment numbers.

Assignment Rate

A monetary value paid to a contingent worker for a specified period of time. For example, an assignment rate could be an hourly overtime rate of $10.50.

Assignment Set

A grouping of employees and applicants that you define for running QuickPaint reports and processing payrolls.

See also: *QuickPaint Report*, page Glossary-32

Assignment Status

For workers, used to track their permanent or temporary departures from your enterprise and, for employees only, to control the remuneration they receive. For applicants, used to track the progress of their applications.

Attribute

In AME, attributes are the business facts of a transaction, such as the total amount of a transaction, percentage of a discount, an item's category, or a person's salary and so on. These business variables form part of the conditions of an approval rule, and determine how the transaction must progress for approvals.

Authoria

A provider of health insurance and compensation information, that provides additional information about benefits choices.

BACS

Banks Automated Clearing System. This is the UK system for making direct deposit payments to employees.

Balance Adjustment

A correction you make to a balance. You can adjust user balances and assignment level predefined balances only.

Balance Dimension

The period for which a balance sums its balance feeds, or the set of assignments/transactions for which it sums them. There are five time dimensions: Run, Period, Quarter, Year and User. You can choose any reset point for user balances.

Balance Feeds

These are the input values of matching units of measure of any elements defined to feed the balance.

Balances

Positive or negative accumulations of values over periods of time normally generated by payroll runs. A balance can sum pay values, time periods or numbers.

See also: *Predefined Components* , page Glossary-30

Bargaining Unit

A bargaining unit is a legally organized group of people which have the right to negotiate on all aspects of terms and conditions with employers or employer federations. A bargaining unit is generally a trade union or a branch of a trade union.

Base Summary

A database table that holds the lowest level of summary. Summary tables are populated and maintained by user-written concurrent programs.

Beneficiary

A person or organization designated to receive the benefits from a benefit plan upon the death of the insured.

Benefit

Any part of an employee's remuneration package that is not pay. Vacation time,

employer-paid medical insurance and stock options are all examples of benefits.

See also: *Elements*, page Glossary-16

Block

The largest subordinate unit of a window, containing information for a specific business function or entity. Every window consists of at least one block. Blocks contain fields and, optionally, regions. They are delineated by a bevelled edge. You must save your entries in one block before navigating to the next.

See also: *Region*, page Glossary-33, *Field*, page Glossary-18

Budget Measurement Type (BMT)

A subset of Workforce Measurement Type. It consists of a number of different units used to measure the workforce. The most common units are headcount and full time equivalent.

Budget Value

In Oracle Human Resources you can enter staffing budget values and actual values for each assignment to measure variances between actual and planned staffing levels in an organization or hierarchy.

Business Group

The business group represents a country in which your enterprise operates. It enables you to group and manage data in accordance with the rules and reporting requirements of each country, and to control access to data.

Business Group Currency

The currency in which Oracle Payroll performs all payroll calculations for your Business Group. If you pay employees in different currencies to this, Oracle Payroll calculates the amounts based on exchange rates defined in the system.

Business Number (BN)

In Canada, this is the employer's account number with Revenue Canada. Consisting of 15 digits, the first 9 identify the employer, the next 2 identify the type of tax account involved (payroll vs. corporate tax), and the last 4 identify the particular account for that tax.

Business Rule

See Configurable Business Rules, page Glossary-10

Cafeteria Benefits Plan

See: *Flexible Benefits Program*, page Glossary-18

Calendar Exceptions

If you are using the Statutory Absence Payments (UK) feature, you define calendar exceptions for an SSP qualifying pattern, to override the pattern on given days. Each calendar exception is another pattern which overrides the usual pattern.

Calendars

In Oracle Human Resources you define calendars that determine the start and end dates for budgetary years, quarters and periods. For each calendar you select a basic period type. If you are using the Statutory Absence Payments (UK) feature, you define calendars to determine the start date and time for SSP qualifying patterns.

Canada/Quebec Pension Plan (CPP/QPP) Contributions

Contributions paid by employers and employees to each of these plans provide income benefits upon retirement.

Candidate

(iRecruitment) A candidate is a person who has either directly provided their personal and professional information to a company's job site or provided their resume and details to a manager or recruiter for entering in the iRecruitment system.

Candidate Offers

An SSHR function used by a line manager to offer a job to a candidate. This function is supplied with its own responsibility.

Career Path

This shows a possible progression from one job or position from any number of other jobs or positions within the Business Group. A career path must be based on either job progression or position progression; you cannot mix the two.

Carry Over

The amount of unused paid time off entitlement an employee brings forward from one accrual term to the next. It may be subject to an expiry date i.e. a date by which it must be used or lost.

See also: *Residual*, page Glossary-34

Cascade

A process managers at each level in a hierarchy use to allocate their own objectives to workers who report directly to them. This technique enables the allocation of enterprise objectives in some form to all workers.

Cash Analysis

A specification of the different currency denominations required for paying your

employees in cash. Union contracts may require you to follow certain cash analysis rules.

Ceiling

The maximum amount of unused paid time off an employee can have in an accrual plan. When an employee reaches this maximum, he or she must use some accrued time before any more time will accrue.

Certification

Documentation required to enroll or change elections in a benefits plan as the result of a life event, to waive participation in a plan, to designate dependents for coverage, or to receive reimbursement for goods or services under an FSA.

Child/Family Support Payments

In Canada, these are payments withheld from an employee's compensation to satisfy a child or family support order from a Provincial Court. The employer is responsible for withholding and remitting the payments to the court named in the order.

Collective Agreement

A collective agreement is a form of contract between an employer or employer representative, for example, an employer federation, and a bargaining unit for example, a union or a union branch.

Collective Agreement Grade

Combination of information that allows you to determine how an employee is ranked or graded in a collective agreement.

Communications

Benefits plan information that is presented in some form to participants. Examples include a pre-enrollment package, an enrollment confirmation statement, or a notice of default enrollment.

Compensation

The pay you give to employees, including wages or salary, and bonuses.

See also: *Elements*, page Glossary-16

Compensation Category

A group of compensation items. Compensation Categories determine the type of compensation that you award under a plan.

Compensation Object

For Standard and Advanced Benefits, compensation objects define, categorize, and help to manage the benefit plans that are offered to eligible participants. Compensation

objects include programs, plan types, plans, options, and combinations of these entities.

Competency

Any measurable behavior required by an organization, job or position that a person may demonstrate in the work context. A competency can be a piece of knowledge, a skill, an attitude, or an attribute.

See also: *Unit Standard Competency*, page Glossary-40

Competency Assessment Template

The entity that configures the Competencies section of an appraisal.

See also: *Objective Assessment Template*, page Glossary-25

Competency Evaluation

A method used to measure an employees ability to do a defined job.

Competency Profile

Where you record applicant and employee accomplishments, for example, proficiency in a competency.

Competency Requirements

Competencies required by an organization, job or position.

See also: *Competency*, page Glossary-10, *Core Competencies*, page Glossary-11

Competency Type

A group of related competencies.

Condition

In AME, a Condition is the *If* part of an Approval Rule that specifies the conditions a transaction must meet to trigger an approval action. A condition consists of an attribute, which is a business variable, and a set of attribute values that you can define. When a transaction meets the specified attribute values, then the application triggers the appropriate action.

Configurable Business Rule

In HRMS position control and budgeting, predefined routines (also called process rules) that run when you apply an online transaction, and validate proposed changes to positions, budgets, or assignments. You set their default status level (typically Warning) to Warning, Ignore, or Error.

Configurable Forms

Forms that your system administrator can modify for ease of use or security purposes by means of Custom Form restrictions. The Form Customization window lists the forms and their methods of configuration.

Consideration

(iRecruitment) Consideration means that a decision is registered about a person in relation to a vacancy so that the person can be contacted.

Consolidation Set

A grouping of payroll runs within the same time period for which you can schedule reporting, costing, and post-run processing.

Contact

A person who has a relationship to an employee that you want to record. Contacts can be dependents, relatives, partners or persons to contact in an emergency.

Content

When you create a spreadsheet or word processing document using Web ADI, the content identifies the data in the document. Content is usually downloaded from the Oracle application database.

Contingent Worker

A worker who does not have a direct employment relationship with an enterprise and is typically a self-employed individual or an agency-supplied worker. The contingent worker is not paid via Oracle Payroll.

Contract

A contract of employment is an agreement between an employer and employee or potential employee that defines the fundamental legal relationship between an employing organization and a person who offers his or her services for hire. The employment contract defines the terms and conditions to which both parties agree and those that are covered by local laws.

Contribution

An employer's or employee's monetary or other contribution to a benefits plan.

Core Competencies

Also known as *Leadership Competencies* or *Management Competencies*. The competencies required by every person to enable the enterprise to meet its goals.

See also: *Competency*, page Glossary-10

Costable Type

A feature that determines the processing an element receives for accounting and costing purposes. There are four costable types in Oracle HRMS: costed, distributed costing, fixed costing, and not costed.

Costing

Recording the costs of an assignment for accounting or reporting purposes. Using Oracle Payroll, you can calculate and transfer costing information to your general ledger and into systems for project management or labor distribution.

Court Order

A ruling from a court that requires an employer to make deductions from an employee's salary for maintenance payments or debts, and to pay the sums deducted to a court or local authority.

See also: *Arrestment*, page Glossary-5

Credit

A part of the Qualifications Framework. The value a national qualifications authority assigns to a unit standard competence or a qualification. For example, one credit may represent 10 hours of study, a unit standard competence may equate to 5 credits, and a qualification may equate to 30 credits.

Criteria Salary Rate

Variable rate of pay for a grade, or grade step. Used by Grade/Step Progression.

Current Period of Service

An employee's period of service is current if their most recent hire date is on or before the effective date, and either the employee does not have a termination date for their latest employment, or their termination date is later than the effective date.

The table below provides an example using an effective date of 12 October 2004:

Effective Date	Hire Date	Termination Date	Current Period of Service?
12 Oct 2004	23 Jan 1994	16 Aug 2003	No
12 Oct 2004	14 Oct 2004	ANY	No
12 Oct 2004	14 Mar 2000	NONE	Yes
12 Oct 2004	11 Sep 2001	15 Oct 2004	Yes

> **Note:** In Oracle HRMS an employee cannot transfer from one business group to another. To move from one business group to another, the business group they are leaving must terminate the employee, and the

business group they are joining must re-hire the employee. Therefore
the definition of period of service, above, does not take account of any
service prior to the most recent business group transfer.

Current Period of Placement

A contingent worker's period of placement, page Glossary-28 is current if their most
recent placement start date is on or before the effective date, and either the contingent
worker does not have a placement end date for their latest placement or their placement
end date is later than the effective date.

Effective Date	Place Date	End Placement Date	Current Period of Placement?
12 Oct 2004	23 Jan 1994	16 Aug 2003	No
12 Oct 2004	14 Oct 2004	ANY	No
12 Oct 2004	14 Mar 2000	NONE	Yes
12 Oct 2004	11 Sep 2001	15 Oct 2004	Yes

Database Item

An item of information in Oracle HRMS that has special programming attached,
enabling Oracle FastFormula to locate and retrieve it for use in formulas.

Date Earned

The date the payroll run uses to determine which element entries to process. In North
America (and typically elsewhere too) it is the last day of the payroll period being
processed.

Date Paid

The effective date of a payroll run. Date paid dictates which tax rules apply and which
tax period or tax year deductions are reported.

Date To and Date From

These fields are used in windows not subject to DateTrack. The period you enter in
these fields remains fixed until you change the values in either field.

See also: *DateTrack*, page Glossary-13, *Effective Date*, page Glossary-15

DateTrack

When you change your effective date (either to past or future), DateTrack enables you to enter information that takes effect on your new effective date, and to review information as of the new date.

See also: *Effective Date*, page Glossary-15

Default Postings

(iRecruitment) Default text stored against business groups, organizations, jobs, and/or positions. The default postings are used to create job postings for a vacancy.

Dependent

In a benefit plan, a person with a proven relationship to the primary participant whom the participant designates to receive coverage based on the terms of the plan.

Deployment

The temporary or permanent employment of an employee in a business group.

See also: *Secondment*, page Glossary-36

Deployment Factors

See: *Work Choices*, page Glossary-41

Deployment Proposal

The entity that controls the permanent transfer or temporary secondment of an employee from a source business group to a destination business group. The HR Professional in the destination business group creates the deployment proposal using the Global Deployments function.

Derived Factor

A factor (such as age, percent of fulltime employment, length of service, compensation level, or the number of hours worked per period) that is used in calculations to determine Participation Eligibility or Activity Rates for one or more benefits.

Descriptive Flexfield

A field that your organization can configure to capture additional information required by your business but not otherwise tracked by Oracle Applications.

See also: *Key Flexfield* , page Glossary-22

Deviation

A change to the standard approver list is a deviation.

Developer Descriptive Flexfield

A flexfield defined by your localization team to meet the specific legislative and

reporting needs of your country.

See also: *Extra Information Types*, page Glossary-18

Direct Deposit

The electronic transfer of an employee's net pay directly into the account(s) designated by the employee.

Discoverer Workbook

A grouping of worksheets. Each worksheet is one report.

Discoverer Worksheet

A single report within a workbook. A report displays the values of predefined criteria for analysis.

Distribution

Monetary payments made from, or hours off from work as allowed by, a compensation or benefits plan.

Download

The process of transferring data from the Oracle HRMS application to your desktop (the original data remains in the application database).

Effective Date

The date for which you are entering and viewing information. You set your effective date in the Alter Effective Date window.

See also: *DateTrack*, page Glossary-13

EIT

See: *Extra Information Type*, page Glossary-18

Electability

The process which determines whether a potential benefits participant, who has satisfied the eligibility rules governing a program, plan, or option in a plan, is able to elect benefits. Participants who are *eligible* for benefits do not always have *electable* benefit choices based on the rules established in a benefit plan design.

Element Classifications

These control the order in which elements are processed and the balances they feed. Primary element classifications and some secondary classifications are predefined by Oracle Payroll. Other secondary classifications can be created by users.

Element Entry

The record controlling an employee's receipt of an element, including the period of time for which the employee receives the element and its value.

See also: *Recurring Elements*, page Glossary-33, *Nonrecurring Elements*, page Glossary-25

Element Link

The association of an element to one or more components of an employee assignment. The link establishes employee eligibility for that element. Employees whose assignment components match the components of the link are eligible for the element.

See also: *Standard Link*, page Glossary-37

Elements

Components in the calculation of employee pay. Each element represents a compensation or benefit type, such as salary, wages, stock purchase plans, and pension contributions.

Element Set

A group of elements that you define to process in a payroll run, or to control access to compensation information from a configured form, or for distributing costs.

Eligibility

The process by which a potential benefits participant satisfies the rules governing whether a person can ever enroll in a program, plan, or option in a plan. A participant who is *eligible* for benefits must also satisfy *electability* requirements.

Eligibility Profile

A set of eligibility criteria grouped together. Eligibility profiles help determine eligibility for compensation and benefits and are re-usable. Eligibility profiles can be linked to a compensation object (such as a program, plan, or option), a collective agreement, a grade ladder, or a work schedule to restrict eligibility for these.

Employee

A worker who has a direct employment relationship with the employer. Employees are typically paid compensation and benefits via the employer's payroll application.

Employees have a system person type of Employee and one or more assignments with an assignment type of Employee.

Employee Histories

An SSHR function for an employee to view their Learning History, Job Application History, Employment History, Absence History, or Salary History. A manager can also use this function to view information on their direct reports.

Employment Category

A component of the employee assignment. Four categories are defined: Full Time - Regular, Full Time - Temporary, Part Time - Regular, and Part Time - Temporary.

Employment Equity Occupational Groups (EEOG)

In Canada, the Employment Equity Occupational Groups (EEOG) consist of 14 classifications of work used in the Employment Equity Report. The EEOGs were derived from the National Occupational Classification system.

Employment Insurance (EI)

Benefit plan run by the federal government to which the majority of Canadian employers and employees must contribute.

Employment Insurance Rate

In Canada, this is the rate at which the employer contributes to the EI fund. The rate is expressed as a percentage of the employee's contribution. If the employer maintains an approved wage loss replacement program, they can reduce their share of EI premiums by obtaining a reduced contribution rate. Employers would remit payroll deductions under a different employer account number for employees covered by the plan.

Enrollment Action Type

Any action required to complete enrollment or de-enrollment in a benefit.

Entitlement

In Australia, this is all unused leave from the previous year that remains to the credit of the employee.

ESS

Employee Self Service. A predefined SSHR responsibility.

Event

An activity such as a training day, review, or meeting, for employees or applicants. Known as *class* in OLM.

Ex-Applicant

Someone who has previously applied for a vacancy or multiple vacancies, but all applications have ended, either because the applicant has withdrawn interest or they have been rejected. Ex-Applicants can still be registered users.

Expected Week of Childbirth (EWC)

In the UK, this is the week in which an employee's baby is due. The Sunday of the expected week of childbirth is used in the calculations for Statutory Maternity Pay

(SMP).

Extra Information Type (EIT)

A type of developer descriptive flexfield that enables you to create an unlimited number of information types for six key areas in Oracle HRMS. Localization teams may also predefine some EITs to meet the specific legislative requirements of your country.

See also: *Developer Descriptive Flexfield*, page Glossary-14

Field

A view or entry area in a window where you enter, view, update, or delete information.

See also: *Block*, page Glossary-7, *Region*, page Glossary-33

Flex Credit

A unit of "purchasing power" in a flexible benefits program. An employee uses flex credits, typically expressed in monetary terms, to "purchase" benefits plans and/or levels of coverage within these plans.

Flexible Benefits Program

A benefits program that offers employees choices among benefits plans and/or levels of coverage. Typically, employees are given a certain amount of flex credits or moneys with which to "purchase" these benefits plans and/or coverage levels.

Flexible Spending Account

(FSA) Under US Internal Revenue Code Section 125, employees can set aside money on a pretax basis to pay for eligible unreimbursed health and dependent care expenses. Annual monetary limits and use-it-or-lose it provisions exist. Accounts are subject to annual maximums and forfeiture rules.

Form

A predefined grouping of functions, called from a menu and displayed, if necessary, on several windows. Forms have blocks, regions and fields as their components.

See also: *Block*, page Glossary-7, *Region*, page Glossary-33, *Field*, page Glossary-18

Format Mask

A definition of a person-name format. The format mask comprises standard name components, such as title, first name, and last name, in an order appropriate to its purpose and legislation.

Format Type

A format-mask classification that identifies the mask's purpose. Oracle HRMS defines the Full Name, Display Name, List Name, and Order Name format types. You can also define your own format types for use in custom code.

Full Time Equivalent (FTE)

A Workforce Measurement Type (WMT) that measures full time equivalent. Although the actual value and calculation may vary, this value is taken from the Assignment Budget Value (ABV) in Oracle HRMS. If the Assignment Budget Value in Oracle HRMS is not set up then a FastFormula is used to determine the value to be calculated.

Global Value

A value you define for any formula to use. Global values can be dates, numbers or text.

Goods or Service Type

A list of goods or services a benefit plan sponsor has approved for reimbursement.

Grade

A component of an employee's assignment that defines their level and can be used to control the value of their salary and other compensation elements.

Grade Comparatio

A comparison of the amount of compensation an employee receives with the mid-point of the valid values defined for his or her grade.

Grade Ladder

The key component of Grade/Step Progression. You use a grade ladder to categorize grades, to determine the rules for how an employee progresses from one grade (or step) to the next, and to record the salary rates associated with each grade or step on the ladder.

Grade Rate

A value or range of values defined as valid for a given grade. Used for validating employee compensation entries.

Grade Scale

A sequence of steps valid for a grade, where each step corresponds to one point on a pay scale. You can place each employee on a point of their grade scale and automatically increment all placements each year, or as required.

See also: *Pay Scale*, page Glossary-27

Grade Step

An increment on a grade scale. Each grade step corresponds to one point on a pay scale.

See also: *Grade Scale*, page Glossary-19

Grandfathered

A term used in Benefits Administration. A person's benefits are said to be grandfathered when a plan changes but they retain the benefits accrued.

Group

A component that you define, using the People Group key flexfield, to assign employees to special groups such as pension plans or unions. You can use groups to determine employees' eligibility for certain elements, and to regulate access to payrolls.

Group Certificate

In Australia, this is a statement from a legal employer showing employment income of an employee for the financial year..

Headcount(HEAD)

A Workforce Measurement Type (WMT) that measures headcount. Although the actual value and calculation may vary, this value is taken from the Assignment Budget Value (ABV) in Oracle HRMS. If the Assignment Budget Value in Oracle HRMS is not set up then a FastFormula is used to determine the value to be calculated.

Hierarchy

An organization or position structure showing reporting lines or other relationships. You can use hierarchies for reporting and for controlling access to Oracle HRMS information.

High Availability

iRecruitment functionality that enables enterprises to switch between two instances to continuously support the candidate job site.

Imputed Income

Certain forms of indirect compensation that US Internal Revenue Service Section 79 defines as fringe benefits and taxes the recipient accordingly. Examples include employer payment of group term life insurance premiums over a certain monetary amount, personal use of a company car, and other non-cash awards.

Incumbent

In Oracle HRMS, the term Incumbent refers to an active worker (employee or contingent worker).

Individual Compensation Distribution

A tool that enables managers assign one-time or recurring awards, bonuses, and allowances to qualified employees such as housing allowances, spot bonuses, and

company cars. Also enables employees to enter voluntary contributions, such as savings plans, charitable organizations, and company perquisites.

Info Online

A generic framework to integrate Oracle applications with partner applications, enabling users to access information from third-party providers, My Oracle Support (formerly MetaLink) and Learning Management.

Initiator

A person who starts a 360 Degree appraisal (Employee or Self) on an individual. An initiator and the appraisee are the only people who can see all appraisal information.

Input Values

Values you define to hold information about elements. In Oracle Payroll, input values are processed by formulas to calculate the element's run result. You can define up to fifteen input values for an element.

Instructions

An SSHR user assistance component displayed on a web page to describe page functionality.

Integrating Application

In AME, an application that uses Oracle Approvals Management Engine to manage the approval processes of its transactions.

Integrator

Defines all the information that you need to download or upload from a particular window or database view using Web ADI.

Interface

A Web ADI term for the item that specifies the columns to be transferred from the Oracle applications database to your desktop or vice versa.

Involuntary

Used in turnover to describe employees who have ceased employment with the enterprise not of their own accord, for example, through redundancy.

Job

A job is a generic role within a business group, which is independent of any single organization. For example, the jobs "Manager" and "Consultant" can occur in many organizations.

Job Posting

An advertisement for a specific vacancy. This is the public side of the vacancy for which a candidate would apply.

Key Flexfield

A flexible data field made up of segments. Each segment has a name you define and a set of valid values you specify. Used as the key to uniquely identify an entity, such as jobs, positions, grades, cost codes, and employee groups.

See also: *Descriptive Flexfield*, page Glossary-14

Layout

Indicates the columns to be displayed in a spreadsheet or Word document created using Web ADI.

Learning Management

Oracle's enterprise learning management system that administers online and offline educational content.

Leave Loading

In Australia, an additional percentage amount of the annual leave paid that is paid to the employee.

Leaver's Statement

In the UK, this Records details of Statutory Sick Pay (SSP) paid during a previous employment (issued as form SSP1L) which is used to calculate a new employee's entitlement to SSP. If a new employee falls sick, and the last date that SSP was paid for under the previous employment is less than eight calendar weeks before the first day of the PIW for the current sickness, the maximum liability for SSP is reduced by the number of weeks of SSP shown on the statement.

Legal Employer

A business in Australia that employs people and has registered with the Australian Tax Office as a Group Employer.

Legal Entity

A legal entity represents the designated legal employer for all employment-related activities. The legal authorities in a country recognize this organization as a separate employer.

Life Event

A significant change in a person's life that results in a change in eligibility or

ineligibility for a benefit.

Life Event Collision

A situation in which the impacts from multiple life events on participation eligibility, enrollability, level of coverage or activity rates conflict with each other.

Life Event Enrollment

A benefits plan enrollment that is prompted by a life event occurring at any time during the plan year.

Linked PIWs

In the UK, these are linked periods of incapacity for work that are treated as one to calculate an employee's entitlement to Statutory Sick Pay (SSP). A period of incapacity for work (PIW) links to an earlier PIW if it is separated by less than the linking interval. A linked PIW can be up to three years long.

Linking Interval

In the UK, this is the number of days that separate two periods of incapacity for work. If a period of incapacity for work (PIW) is separated from a previous PIW by less than the linking interval, they are treated as one PIW according to the legislation for entitlement to Statutory Sick Pay (SSP). An employee can only receive SSP for the maximum number of weeks defined in the legislation for one PIW.

LMSS

Line Manager Self Service. A predefined SSHR responsibility.

Long Service Leave

Leave with pay granted to employees of a particular employer after a prescribed period of service or employment with that employer.

Lookup Types

Categories of information, such as nationality, address type and tax type, that have a limited list of valid values. You can define your own Lookup Types, and you can add values to some predefined Lookup Types.

Lower Earnings Limit (LEL)

In the UK, this is the minimum average weekly amount an employee must earn to pay National Insurance contributions. Employees who do not earn enough to pay National Insurance cannot receive Statutory Sick Pay (SSP) or Statutory Maternity Pay (SMP).

Manager

(iRecruitment) A manager accesses the iRecruitment system to document their hiring

needs and conduct their recruiting activities online. Specifically, these activities include vacancy definition, searching for candidates, and processing applicants through the vacancy process.

Manager-Employee Appraisal

Part of the Appraisal function. A manager appraisal of an employee. However, an appraising manager does not have to be a manager.

Mapping

If you are bringing in data from a text file to Oracle HRMS using a spreadsheet created in Web ADI, you need to map the columns in the text file to the application's tables and columns.

Maternity Pay Period

In the UK, this is the period for which Statutory Maternity Pay (SMP) is paid. It may start at any time from the start of the 11th week before the expected week of confinement and can continue for up to 18 weeks. The start date is usually agreed with the employee, but can start at any time up to the birth. An employee is not eligible to SMP for any week in which she works or for any other reason for ineligibility, defined by the legislation for SMP.

Medicare Levy

An amount payable by most taxpayers in Australia to cover some of the cost of the public health system.

Menus

You set up your own navigation menus, to suit the needs of different users.

My Account

(iRecruitment) My Account is the total of either a candidate or applicant's personal and vacancy-specific information including the information needed to manage their progress through the recruitment process.

NACHA

National Automated Clearing House Association. This is the US system for making direct deposit payments to employees.

National Identifier

This is the alphanumeric code that is used to uniquely identify a person within their country. It is often used for taxation purposes. For example, in the US it is the Social Security Number, in Italy it is the Fiscal Code, and in New Zealand it is the IRD Number.

National Occupational Classification (NOC) code

In Canada, the National Occupational Classification (NOC) System was developed to best reflect the type of work performed by employees. Occupations are grouped in terms of particular tasks, duties and responsibilities. The use of this standardized system ensures consistency of data from year to year within the same company as well as between companies. These codes are used in the Employment Equity Report.

Net Accrual Calculation

The rule that defines which element entries add to or subtract from a plan's accrual amount to give net entitlement.

Net Entitlement

The amount of unused paid time off an employee has available in an accrual plan at any given point in time.

Nonrecurring Elements

Elements that process for one payroll period only unless you make a new entry for an employee.

See also: *Recurring Elements*, page Glossary-33

North American Industrial Classification (NAIC) code

The North American Industrial Classification system (NAICs) was developed jointly by the US, Canada and Mexico to provide comparability in statistics regarding business activity across North America. The NAIC replaces the US Standard Industrial Classification (SIC) system, and is used in the Employment Equity Report.

Not in Program Plan

A benefit plan that you define outside of a program.

Objective Assessment Template

The entity that configures the Objectives section of the appraisal.

See also: **Competency Assessment Template**, page Glossary-10

Objectives Library

A collection of reusable objectives. HR Professionals can either create individual objectives in the Objectives Library or import them from an external source.

Off-Boarding

Descriptive term covering all HR processes and procedures involved in removing a worker from your organization, including termination, relocation, and long-term sickness.

OLM

Oracle Learning Management.

On-Boarding

Descriptive term covering all HR processes and procedures involved in hiring and integrating a worker in your organization, including recruitment, hiring, and orientation.

Online Analytical Processing (OLAP)

Analysis of data that reveals business trends and statistics that are not immediately visible in operational data.

Online Transactional Processing (OLTP)

The storage of data from day-to-day business transactions into the database that contains operational data.

Open Enrollment

A type of scheduled enrollment in which participants can enroll in or alter elections in one or more benefits plans.

Options

A level of coverage for a participant's election, such as Employee Only for a medical plan, or 2x Salary for a life insurance plan.

Oracle FastFormula

Formulas are generic expressions of calculations or comparisons you want to repeat with different input values. With Oracle FastFormula you can write formulas using English words and basic mathematical functions. The output of FastFormulas is fed back into reports.

Organization

A required component of employee assignments. You can define as many organizations as you want within your Business Group. Organizations can be internal, such as departments, or external, such as recruitment agencies. You can structure your organizations into organizational hierarchies for reporting purposes and for system access control.

Organization Manager Hierarchy

An HRMS structure that contains supervisors and subordinates on a reporting chain who also own organizations. HRMS uses this hierarchy to filter the information you display in report modules.

OSSWA

Oracle Self Service Web Applications.

Outcome

For a unit standard competence, a behavior or performance standard associated with one or more assessment criteria. A worker achieves a unit standard competence when they achieve all outcomes for that competence.

Overrides

You can enter overrides for an element's pay or input values for a single payroll period. This is useful, for example, when you want to correct errors in data entry for a nonrecurring element before a payroll run.

Parameter Portlet

A portlet in which you select a number of parameters that may affect all your portlets on your page. These may include an effective date, the reporting period, the comparison type, the reporting manager, and the output currency for your reports. The parameter portlet is usually available at the top of the portal page.

Pattern

A pattern comprises a sequence of time units that are repeated at a specified frequency. The Statutory Absence Payments (UK) feature, uses SSP qualifying patterns to determine employees entitlement to Statutory Sick Pay (SSP).

Pattern Time Units

A sequence of time units specifies a repeating pattern. Each time unit specifies a time period of hours, days or weeks.

Pay Scale

A set of progression points that can be related to one or more rates of pay. Employee's are placed on a particular point on the scale according to their grade and, usually, work experience.

See also: *Grade Scale*, page Glossary-19

Pay Value

An amount you enter for an element that becomes its run item without formula calculations.

See also: *Input Values*, page Glossary-21

Payment Type

There are three standard payment types for paying employees: check, cash and direct deposit. You can define your own payment methods corresponding to these types.

Payroll

A group of employees that Oracle Payroll processes together with the same processing frequency, for example, weekly, monthly or bimonthly. Within a Business Group, you can set up as many payrolls as you need.

Payroll Reversal

A payroll reversal occurs when you reverse a payroll run for a single employee, in effect cancelling the run for this employee.

Payroll Rollback

You can schedule a payroll rollback when you want to reverse an entire payroll run, cancelling out all information processed in that run. To preserve data integrity, you can roll back only one payroll at a time, starting with the one most recently run.

Payroll Run

The process that performs all the payroll calculations. You can set payrolls to run at any interval you want.

People List

An SSHR line manager utility used to locate an employee.

Performance Management Plan

The entity that defines the performance-management process for a specified period. A component of the Workforce Performance Management function.

Performance Management Viewer (PMV)

A reporting tool that displays the report that corresponds to one or more PMF targets.

Period of Incapacity for Work (PIW)

In the UK, this is a period of sickness that lasts four or more days in a row, and is the minimum amount of sickness for which Statutory Sick Pay can be paid. If a PIW is separated by less then the linking interval, a linked PIW is formed and the two PIWs are treated as one.

Period of Placement

The period of time a contingent worker spends working for an enterprise. A contingent worker can have only one period of placement at a time; however, a contingent worker can have multiple assignments during a single period of placement.

Period Type

A time division in a budgetary calendar, such as week, month, or quarter.

Personal Public Service Number (PPS)

The Irish equivalent to National Insurance number in the UK, or the Social Security number in the US.

Personal Tax Credits Return (TD1)

A Revenue Canada form which each employee must complete. Used by the employee to reduce his or her taxable income at source by claiming eligible credits and also provides payroll with such important information as current address, birth date, and SIN. These credits determine the amount to withhold from the employee's wages for federal/provincial taxes.

Person Search

An SSHR function which enables a manager to search for a person. There are two types of search, Simple and Advanced.

Person Type

There are eight system person types in Oracle HRMS. Seven of these are combinations of employees, ex-employees, applicants, and ex-applicants. The eighth category is 'External'. You can create your own user person types based on the eight system types.

Personal Scorecard

A collection of objectives for a single worker arising from a single Performance Management Plan.

Personnel Actions

Personnel actions is a public sector term describing business processes that define and document the status and conditions of employment. Examples include hiring, training, placement, discipline, promotion, transfer, compensation, or termination. Oracle HRMS uses the term *self-service actions* synonymously with this public sector term. Oracle Self Service Human Resources (SSHR) provides a configurable set of tools and web flows for initiating, updating, and approving self-service actions.

Plan Design

The functional area that allows you to set up your benefits programs and plans. This process involves defining the rules which govern eligibility, available options, pricing, plan years, third party administrators, tax impacts, plan assets, distribution options, required reporting, and communications.

Plan Sponsor

The legal entity or business responsible for funding and administering a benefits plan. Generally synonymous with employer.

Position

A specific role within the Business Group derived from an organization and a job. For example, you may have a position of Shipping Clerk associated with the organization Shipping and the job Clerk.

Predefined Components

Some elements and balances, all primary element classifications and some secondary classifications are defined by Oracle Payroll to meet legislative requirements, and are supplied to users with the product. You cannot delete these predefined components.

Process Rule

See Configurable Business Rules, page Glossary-10

Professional Information

An SSHR function which allows an employee to maintain their own professional details or a line manager to maintain their direct reports professional details.

Proficiency

A worker's perceived level of expertise in a competency, in the opinion of an assessor, over a given period. For example, a worker may demonstrate the communication competency at Novice or Expert level.

Progression Point

A pay scale is calibrated in progression points, which form a sequence for the progression of employees up the pay scale.

See also: *Pay Scale*, page Glossary-27

Prospect Pool

(iRecruitment) The prospect pool contains all registered users who have given permission for their information to be published.

Provincial/Territorial Employment Standards Acts

In Canada, these are laws covering minimum wages, hours of work, overtime, child labour, maternity, vacation, public/general holidays, parental and adoption leave, etc., for employees regulated by provincial/territorial legislation.

Provincial Health Number

In Canada, this is the account number of the provincially administered health care plan that the employer would use to make remittances. There would be a unique number for each of the provincially controlled plans i.e. EHT, Quebec HSF, etc.

PTO Accrual Plan

A benefit in which employees enroll to entitle them to accrue and take paid time off (PTO). The purpose of absences allowed under the plan, who can enroll, how much time accrues, when the time must be used, and other rules are defined for the plan.

QPP

(See Canada/Quebec Pension Plan)

QA Organization

Quality Assurance Organization. Providers of training that leads to Qualifications Framework qualifications register with a QA Organization. The QA Organization is responsible for monitoring training standards.

Qualification Type

An identified qualification method of achieving proficiency in a competence, such as an award, educational qualification, a license or a test.

See also: *Competence*, page Glossary-10

Qualifications Framework

A national structure for the registration and definition of formal qualifications. It identifies the unit standard competencies that lead to a particular qualification, the awarding body, and the field of learning to which the qualification belongs, for example.

Qualifying Days

In the UK, these are days on which Statutory Sick Pay (SSP) can be paid, and the only days that count as waiting days. Qualifying days are normally work days, but other days may be agreed.

Qualifying Pattern

See: *SSP Qualifying Pattern*, page Glossary-37

Qualifying Week

In the UK, this is the week during pregnancy that is used as the basis for the qualifying rules for Statutory Maternity Pay (SMP). The date of the qualifying week is fifteen weeks before the expected week of confinement and an employee must have been continuously employed for at least 26 weeks continuing into the qualifying week to be entitled to SMP.

Quebec Business Number

In Canada, this is the employer's account number with the Ministere du Revenu du Quebec, also known as the Quebec Identification number. It consists of 15 digits, the

first 9 identify the employer, the next 2 identify the type of tax account involved (payroll vs. corporate tax), and the last 4 identify the particular account for that tax.

Questionnaire

A function which records the results of an appraisal.

QuickPaint Report

A method of reporting on employee and applicant assignment information. You can select items of information, paint them on a report layout, add explanatory text, and save the report definition to run whenever you want.

See also: *Assignment Set*, page Glossary-5

QuickPay

QuickPay allows you to run payroll processing for one employee in a few minutes' time. It is useful for calculating pay while someone waits, or for testing payroll formulas.

Ranking

(iRecruitment) A manually entered value to indicate the quality of the applicant against other applicants for a specific vacancy.

Rates

A set of values for employee grades or progression points. For example, you can define salary rates and overtime rates.

Rate By Criteria

A function that enables the calculation of pay from different rates for each role a worker performs in a time period.

Rating Scale

Used to describe an enterprise's competencies in a general way. You do not hold the proficiency level at the competence level.

Record of Employment (ROE)

A Human Resources Development Canada form that must be completed by an employer whenever an interruption of earnings occurs for any employee. This form is necessary to claim Employment Insurance benefits.

Recruitment Activity

An event or program to attract applications for employment. Newspaper advertisements, career fairs and recruitment evenings are all examples of recruitment activities. You can group several recruitment activities together within an overall

activity.

Recurring Elements

Elements that process regularly at a predefined frequency. Recurring element entries exist from the time you create them until you delete them, or the employee ceases to be eligible for the element. Recurring elements can have standard links.

See also: *Nonrecurring Elements*, page Glossary-25, *Standard Link*, page Glossary-37

Recruiting Area

A recruiting area consists of a set of countries, business groups, and locations. Define recruiting areas using the Generic Hierarchy function of Oracle HRMS. In iRecruitment, when managers create vacancies, they can select multiple locations as vacancy locations using recruiting areas.

Referenced Rule

In HRMS budgeting, any predefined configurable business rule in the Assignment Modification, Position Modification, or Budget Preparation Categories you use as the basis for defining a new rule.

See Configurable Business Rules, page Glossary-10

Region

A collection of logically related fields in a window, set apart from other fields by a rectangular box or a horizontal line across the window.

See also: *Block*, page Glossary-7, *Field*, page Glossary-18

Registered Pension Plan (RPP)

This is a pension plan that has been registered with Revenue Canada. It is a plan where funds are set aside by an employer, an employee, or both to provide a pension to employees when they retire. Employee contributions are generally exempt from tax.

Registered Retirement Savings Plan (RRSP)

This is an individual retirement savings plan that has been registered with Revenue Canada. Usually, contributions to the RRSP, and any income earned within the RRSP, is exempt from tax.

Registered User

(iRecruitment) A person who has registered with the iRecruitment site by entering an e-mail address and password. A registered user does not necessarily have to apply for jobs.

Reporting Group

A collection of programs and plans that you group together for reporting purposes, such as for administrative use or to meet regulatory requirements.

Report Parameters

Inputs you make when submitting a report to control the sorting, formatting, selection, and summarizing of information in the report.

Report Set

A group of reports and concurrent processes that you specify to run together.

Requisition

The statement of a requirement for a vacancy or group of vacancies.

Request Groups

A list of reports and processes that can be submitted by holders of a particular responsibility.

See also: *Responsibility*, page Glossary-34

Residual

The amount of unused paid time off entitlement an employee loses at the end of an accrual term. Typically employees can carry over unused time, up to a maximum, but they lose any residual time that exceeds this limit.

See also: *Carry Over*, page Glossary-8

Responsibility

A level of authority in an application. Each responsibility lets you access a specific set of Oracle Applications forms, menus, reports, and data to fulfill your business role. Several users can share a responsibility, and a single user can have multiple responsibilities.

See also: *Security Profile*, page Glossary-36, *User Profile Options*, page Glossary-40, *Request Groups*, page Glossary-34, *Security Groups*, page Glossary-34

Resume

A document that describes the experience and qualifications of a candidate.

RetroPay

A process that recalculates the amount to pay an employee in the current period to account for retrospective changes that occurred in previous payroll periods.

Retry

Method of correcting a payroll run or other process *before* any post-run processing takes place. The original run results are deleted and the process is run again.

Revenue Canada

Department of the Government of Canada which, amongst other responsibilities,

administers, adjudicates, and receives remittances for all taxation in Canada including income tax, Employment Insurance premiums, Canada Pension Plan contributions, and the Goods and Services Tax (legislation is currently proposed to revise the name to the Canada Customs and Revenue Agency). In the province of Quebec the equivalent is the Ministere du Revenu du Quebec.

Reversal

Method of correcting payroll runs or QuickPay runs *after* post-run processing has taken place. The system replaces positive run result values with negative ones, and negative run result values with positive ones. Both old and new values remain on the database.

Reviewer (SSHR)

A person invited by an appraising manager to add review comments to an appraisal.

RIA

Research Institute of America (RIA), a provider of tax research, practice materials, and compliance tools for professionals, that provides U.S. users with tax information.

Rollback

Method of removing a payroll run or other process *before* any post-run processing takes place. All assignments and run results are deleted.

Rollup

An aggregate of data that includes subsidiary totals.

Run Item

The amount an element contributes to pay or to a balance resulting from its processing during the payroll run. The Run Item is also known as calculated pay.

Salary Basis

The period of time for which an employee's salary is quoted, such as hourly or annually. Defines a group of employees assigned to the same salary basis and receiving the same salary element.

Salary Rate

The rate of pay associated with a grade or step. Used by Grade/Step Progression.

Scheduled Enrollment

A benefits plan enrollment that takes place during a predefined enrollment period. Scheduled enrollments can be administrative, or open.

Search by Date

An SSHR sub-function used to search for a Person by Hire date, Application date, Job posting date or search by a Training event date.

Secondment

The temporary transfer of an employee to a different business group.

Security Group

Security groupsenable HRMS users to partition data by Business Group. Only used for Security Groups Enabled security.

See also: *Responsibility*, page Glossary-34, *Security Profile*, page Glossary-36, *User Profile Options*, page Glossary-40

Security Groups Enabled

Formerly known as Cross Business Group Responsibility security. This security model uses security groups and enables you to link one responsibility to many Business Groups.

Security Profile

Security profiles control access to organizations, positions and employee and applicant records within the Business Group. System administrators use them in defining users' responsibilities.

See also: *Responsibility*, page Glossary-34

Self Appraisal

Part of the Appraisal function. This is an appraisal undertaken by an employee to rate their own performance and competencies.

Separation Category

Separation category groups the leaving reasons. HRMS*i* refers to Termination Category as Separation Category.

See also: *termination category*, page Glossary-39

Site Visitor

(iRecruitment) A person who navigates to the iRecruitment web site and may view job postings. This person has not yet registered or logged in to the iRecruitment system. This individual may search for postings on the web site and also has the ability to log in or register with the iRecruitment site.

SMP

See: *Statutory Maternity Pay*, page Glossary-38

Social Insurance Number (SIN)

A unique number provided by Human Resources Development Canada (HRDC) to each person commencing employment in Canada. The number consists of 9 digits in the following format (###-###-###).

Source Deductions Return (TP 1015.3)

A Ministere du Revenu du Quebec form which each employee must complete. This form is used by the employee to reduce his or her taxable income at source by claiming eligible credits and also provides payroll with such important information as current address, birth date, and SIN. These credits determine the amount of provincial tax to withhold from the employee's wages.

Special Information Types

Categories of personal information, such as skills, that you define in the Personal Analysis key flexfield.

Special Run

The first run of a recurring element in a payroll period is its normal run. Subsequent runs in the same period are called special runs. When you define recurring elements you specify Yes or No for special run processing.

SSHR

Oracle Self-Service Human Resources. An HR management system using an intranet and web browser to deliver functionality to employees and their managers.

SSP

See: *Statutory Sick Pay*, page Glossary-38

SSP Qualifying Pattern

In the UK, an SSP qualifying pattern is a series of qualifying days that may be repeated weekly, monthly or some other frequency. Each week in a pattern must include at least one qualifying day. Qualifying days are the only days for which Statutory Sick Pay (SSP) can be paid, and you define SSP qualifying patterns for all the employees in your organization so that their entitlement to SSP can be calculated.

Standard HRMS Security

The standard security model. Using this security model you must log on as a different user to see a different Business Group.

Standard Link

Recurring elements with standard links have their element entries automatically created for all employees whose assignment components match the link.

See also: *Element Link*, page Glossary-16, *Recurring Elements*, page Glossary-33

Statement of Commissions and Expenses for Source Deduction Purposes (TP 1015.R.13.1)

A Ministere du Revenu du Quebec form which allows an employee who is paid partly or entirely by commissions to pay a constant percentage of income tax based on his or her estimated commissions for the year, less allowable business expenses.

Statement of Earnings (SOE)

A summary of the calculated earnings and deductions for an assignment in a payroll period.

Statement of Remuneration and Expenses (TD1X)

In Canada, the Statement of Remuneration and Expenses allows an employee who is paid partly or entirely by commission to pay a constant percentage of income tax, based on his or her estimated income for the year, less business-related expenses.

Statutory Adoption Pay

In the UK, Statutory Adoption Pay (SAP) is payable to a person of either sex with whom a child is, or is expected to be, placed for adoption under UK law.

Statutory Maternity Pay

In the UK, you pay Statutory Maternity Pay (SMP) to female employees who take time off work to have a baby, providing they meet the statutory requirements set out in the legislation for SMP.

Statutory Sick Pay

In the UK, you pay Statutory Sick Pay (SSP) to employees who are off work for four or more days because they are sick, providing they meet the statutory requirements set out in the legislation for SSP.

Statutory Paternity Pay

In the UK, Statutory Paternity Pay Birth (SPPB) is payable to a person supporting the mother at the time of birth. In cases of adoption, the primary carer receives Statutory Adoption Pay, while the secondary carer receives Statutory Paternity Pay Adoption (SPPA).

Student Employee

A student who is following a work-study program. Student employees have HRMS person records (of system type Employee) so that you can include them in your payroll.

Suitability Matching

An SSHR function which enables a manager to compare and rank a persons competencies.

Superannuation Guarantee

An Australian system whereby employers are required to contribute a percentage of an eligible employee's earnings to a superannuation fund to provide for their retirement.

Supplier

An internal or external organization providing contingent workers for an organization. Typically suppliers are employment or recruitment agencies.

Supporting Objective

An objective aligned with another objective. Supporting objectives contribute to the achievement of the objectives they support.

Tabbed Regions

Parts of a window that appear in a stack so that only one is visible at any time. You click on the tab of the required region to bring it to the top of the stack.

Task Flows

A sequence of windows linked by buttons to take you through the steps required to complete a task, such as hiring a new recruit. System administrators can create task flows to meet the needs of groups of users.

Tax Point

The date from which tax becomes payable.

Template Letter

Form letter or skeleton letter that acts as the basis for creating mail merge letters. The template letter contains the standard text, and also contains field codes, which are replaced by data from the application during the mail merge process.

Terminating Employees

You terminate an employee when he or she leaves your organization. Information about the employee remains on the system but all current assignments are ended.

Termination Category

When employees leave an enterprise, the decision is either made by the employee or by the enterprise. When the decision is made by the employee the termination is Voluntary. When the decision is made by the enterprise, the termination is Involuntary.

HRMSi elsewhere refers to Termination Category as Separation Category.

Termination Rule

Specifies when entries of an element should close down for an employee who leaves

your enterprise. You can define that entries end on the employee's actual termination date or remain open until a final processing date.

Tips

An SSHR user assistance component that provides information about a field.

Total Compensation Statement

A module to communicate compensations, rewards, and benefits to employees and contingent workers.

Transaction Type

In AME, an integrating application may divide its transactions into several categories, where each category requires a distinct set of approval rules. Each set of rules is a transaction type. Different transaction types can use the same attribute name to represent values that the application fetches from different places. This enables several transaction types to share approval rules, thus facilitating a uniform approval policy across multiple transaction types.

Transcentive

A third-party compensation management solutions provider, that provides additional information about benefits choices.

Unit Standard

A nationally registered document that describes a standard of performance. The standard is typically defined and maintained by industry representatives.

Unit Standard Competency

A competency that is defined in a Unit Standard and linked to a Qualifications Framework qualification.

Upload

The process of transferring the data from a spreadsheet on your desktop, created using Web ADI, back to the Oracle HRMS application.

User Assistance Components

SSHR online help comprising tips and instructions.

User Balances

Users can create, update and delete their own balances, including dimensions and balance feeds.

See also: *Balances*, page Glossary-6

User Profile Options

Features that allow system administrators and users to tailor Oracle HRMS to their exact requirements.

See also: *Responsibility*, page Glossary-34, *Security Profile*, page Glossary-36

User-based Security

With this type of security, the application generates the security permissions for a current user when that user logs on to a system. The system uses the security profile (can be position, supervisor, or organization-based, for example) to generate security permissions for the current user, for example, based on the user's position. An alternative to user-based security is a security profile with defined security rules, for example, to specify that the top-level position for a position-based security profile is Position A, irrespective of the current user's position.

View

An example of an interface that you can use to download data from the Oracle HRMS application to a spreadsheet using Web ADI.

Viewer (SSHR)

A person with view only access to an appraisal. An appraising manager or an employee in a 360 Degree Self appraisal can appoint view only access to an appraisal.

Viewer (Web ADI)

A desktop application, such as a spreadsheet or word processing tool, that you use to view the data downloaded from Oracle HRMS via Web ADI.

Voluntary

Term used in turnover to describe employees who have ceased employment with the enterprise of their own accord, for example, by resigning.

Waiting Days

In the UK, statutory Sick Pay is not payable for the first three qualifying days in period of incapacity for work (PIW), which are called waiting days. They are not necessarily the same as the first three days of sickness, as waiting days can be carried forward from a previous PIW if the linking interval between the two PIWs is less than 56 days.

WCB Account Number

In Canada, this is the account number of the provincially administered Workers' Compensation Board that the employer would use to make remittances. There would be a unique number for each of the provincially controlled boards i.e. Workplace Safety & Insurance Board of Ontario, CSST, etc.

Work Choices

Also known as Work Preferences, Deployment Factors, or Work Factors. These can affect a person's capacity to be deployed within an enterprise, such willingness to travel or relocate. You can hold work choices at both job and position level, or at person level.

Worker

An employee, page Glossary-16 or a contingent worker, page Glossary-11

Workers' Compensation Board

In Canada, this is a provincially governed legislative body which provides benefits to employees upon injury, disability, or death while performing the duties of the employer. Workers' Compensation Board premiums are paid entirely by the employer.

Workflow

An Oracle application which uses charts to manage approval processes and in addition is used in SSHR to configure display values of sections within a web page and instructions.

Workforce Measurement Type (WMT)

Groups of different units combined to measure the workforce. The most common units are headcount and full time equivalent.

Workforce Measurement Value (WMV)

A WMT value, for example, headcount or FTE.

Workforce Performance Management

The Oracle HRMS functions that support enterprise-directed objective setting, management, and assessment.

Work Structures

The fundamental definitions of organizations, jobs, positions, grades, payrolls and other employee groups within your enterprise that provide the framework for defining the work assignments of your employees.

Index